Basic Steps for New Charter Setup

April, 2011

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Basic Setup for a New Charter

When a charter school begins using SIS 2000+ for the first time, there are a number of steps that must be completed to get the school up and running. This tutorial will go through each step and at the end of this document you will find a checklist of each item discussed in the tutorial.

Establish Remote Access to Terminal Services

Remote Access

Your SIS Support Specialist will give you a link for logging in to the client (FoxPro) from your PC. If you have a Mac computer, in order to log in to Terminal Services, you have two options:

- Have a Windows PC available for using FoxPro.
- Have Windows available on your Mac.

Install Uniprint

Uniprint is the tool you will use to print reports while logged in to Terminal Services. Your SIS Support Specialist will help you get that installed.

Apply for SSID and MoveIT logins

SSID

You will need to contact the SSID department to get a login to the SSID site. This login is important as it gives you the ability to work with the SSID numbers for your students.

MoveIT

Your SIS Specialist will apply for your MoveIT (secure site) login on your behalf. Typically only two people per LEA are given access to this site. The MoveIT site is where you will upload your clearinghouse files as well as other sensitive data.

To create a request, your SIS Specialist will need the following information for each user who needs access:

- User's name
- User's contact information
- User's position at the school

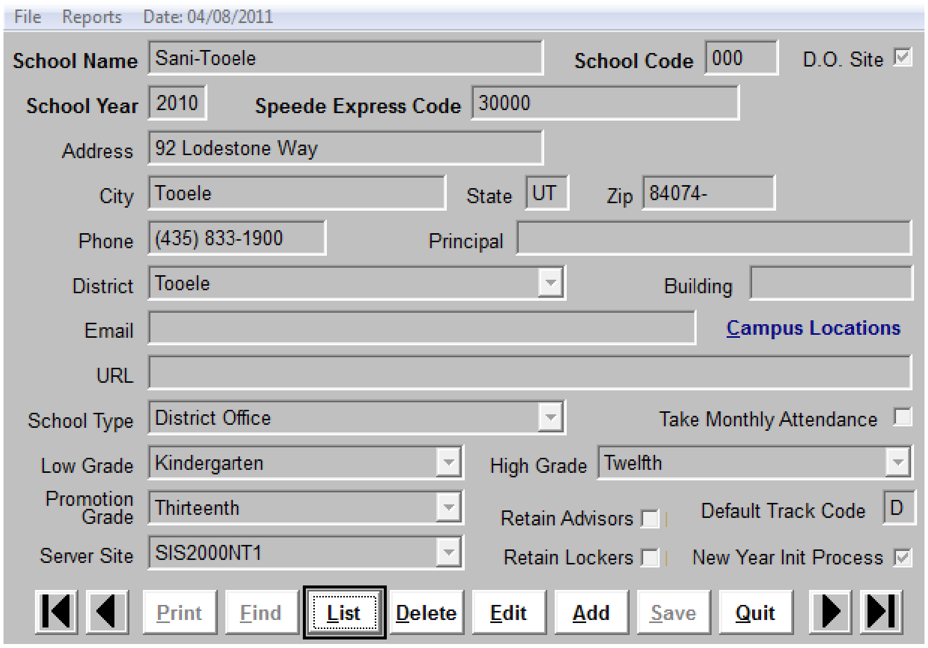
This request must come in an email from the director or principal at the school.

School Editor

Both a school and a district office need to exist within the School Editor module in FoxPro. USOE will create these for you, but you will need to edit the screens to make sure the data is complete.

Editing the District Office

In FoxPro, go to System > School Editor. The following screen will display. You will need to make sure the data entered is correct. Use the arrow in the bottom corners to scroll to the District Office screen as well.

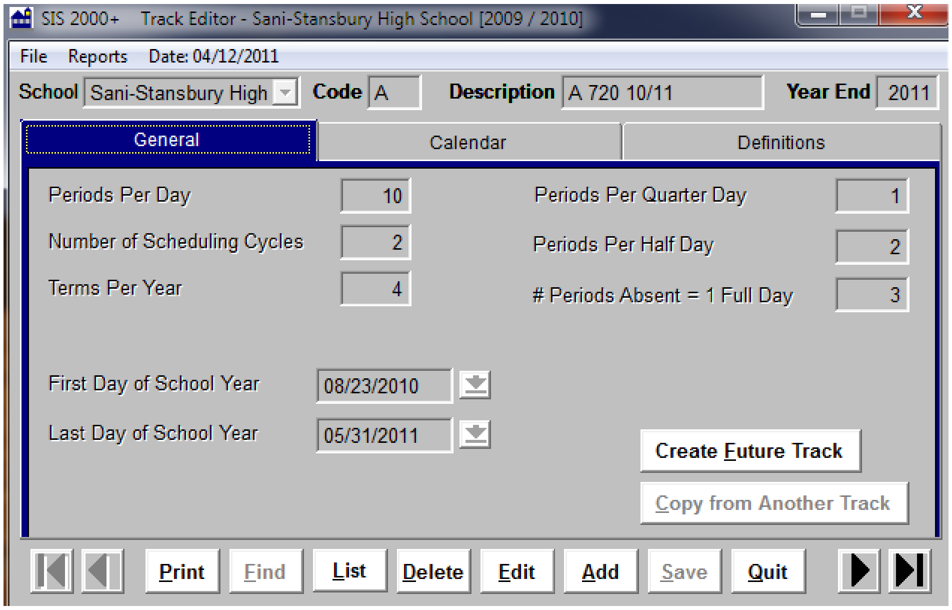


- If data needs to be changed or added, press **Edit** and enter data in the appropriate fields.
- Press **Save**.

Track Editor

Before you can enter any faculty or student data, you need to create a track, which is your school year. You should have a track set up for each school year in both the District login and the school login.

To access the Track Editor, go to System > Track Editor. The following screen will display.



Tracks form the basis for all activity in a school's database: A calendar is created for a track, students are enrolled into a track, faculty members are designated as active to teach in specific tracks, and there is a master schedule for each track.

The calendar portion of a track defines cycle days, periods, and terms for the track. In addition, vacation days or non-attendance days are also defined. Your district and school calendars should match.

NOTE: Once a track is created, there is a useful order in which to proceed to get the cycles set up. The general order is as follows:

1. Define periods, terms and cycle days.
2. Create an event calendar and cycle days calendar.

This guide will go through these steps in the order described above.

Creating a Track

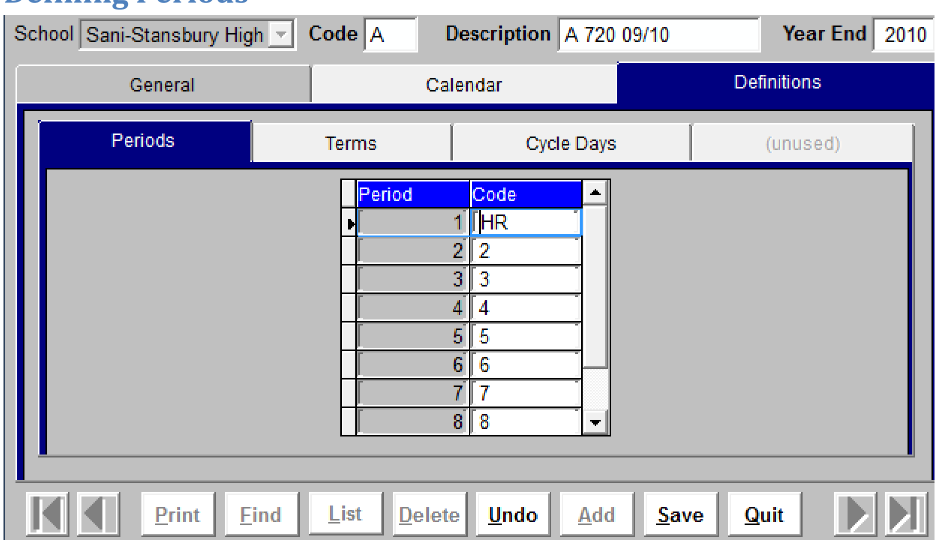
When you first open the Track Editor, a track will have been created for you and default information will have been entered. You will need to edit the screen and make sure correct data is entered.

- **Code** – this is the code for the track. This field typically defaults to "A".
- **Description** – this is more descriptive information. An example is "A 720 10/11". The "A" is the default code, "720" represents the school code, and "10/11" represents the school year.
- **Year End** – enter the year in which the school year ends.
- **Periods Per Day –** number of periods in one school day.

- **Number of Scheduling Cycles –** number of days it takes for the students to complete all of their courses. This number defaults to “1”. If you only have one cycle day, you do not have to edit this field.
- **Terms Per Year** – this field indicates how long courses last. If they are quarter classes, Terms Per Year would be 4. If they are semester classes, Terms Per Year would be 2. If the students have the same classes and teachers for the entire year, Terms Per Year would be 1.
- **Periods Per Quarter Day** – the number of periods in one quarter of the day. If there are four periods in a day, then there is one period in a quarter day.
- **Periods Per Half Day** - the number of periods in half a day of school. If there are four periods in a day, then there would be two in half the day.
- **# Periods Absent = 1 Full Day** – this field indicates how many periods a student has to miss to be considered absent for that day. This is for Clearinghouse purposes. Set this field carefully.
- **First Day of School Year –** enter the first day of that track’s school year.
- **Last Day of School Year** – enter the last day of that track’s school year.
- **Create Future Track –** pressing this button will create a future track. This will copy from the existing track.

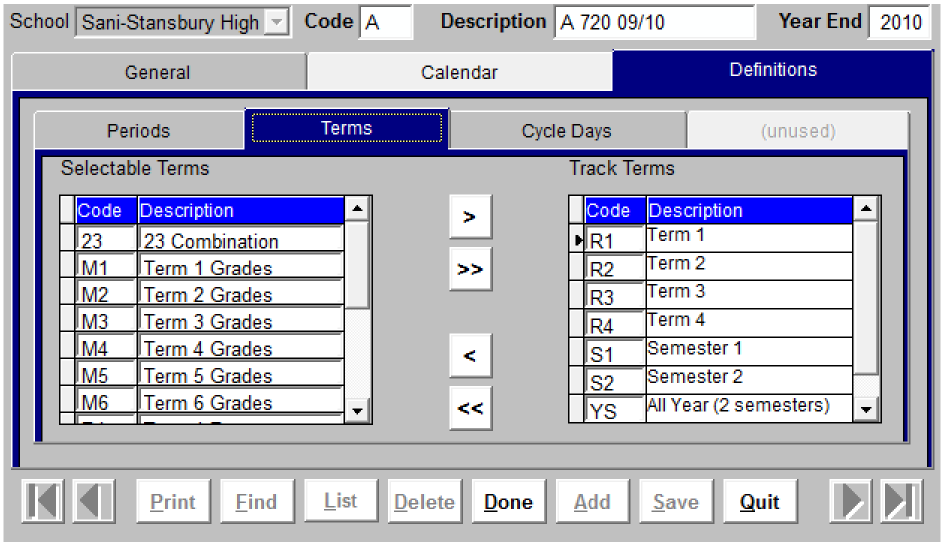
Defining Periods, Terms, and Cycle Days

Defining Periods



Go to the **Definitions** tab > **Periods**. Press **Edit** to change the period labels (Codes) if needed. For example, if you wish to make period 1 the Homeroom, you can change the code to “HR”.

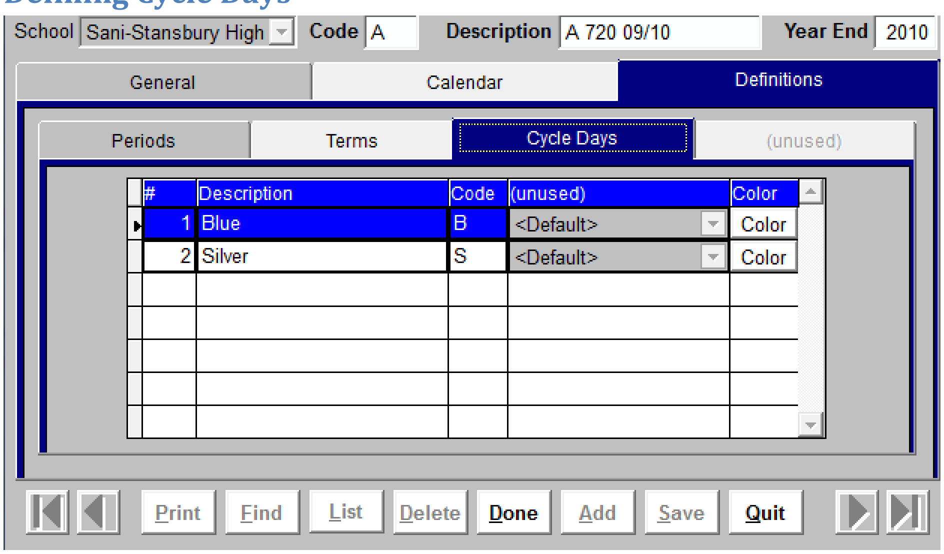
Defining Terms



On the **Definitions** > **Terms** tab, set the term, semester, and year codes. If these are not set, when someone tries to add a course, for example a semester course, they may not have the option to choose that course if no semester code has been added. Also, these terms will calculate school credits, so it's important that they be accurate.

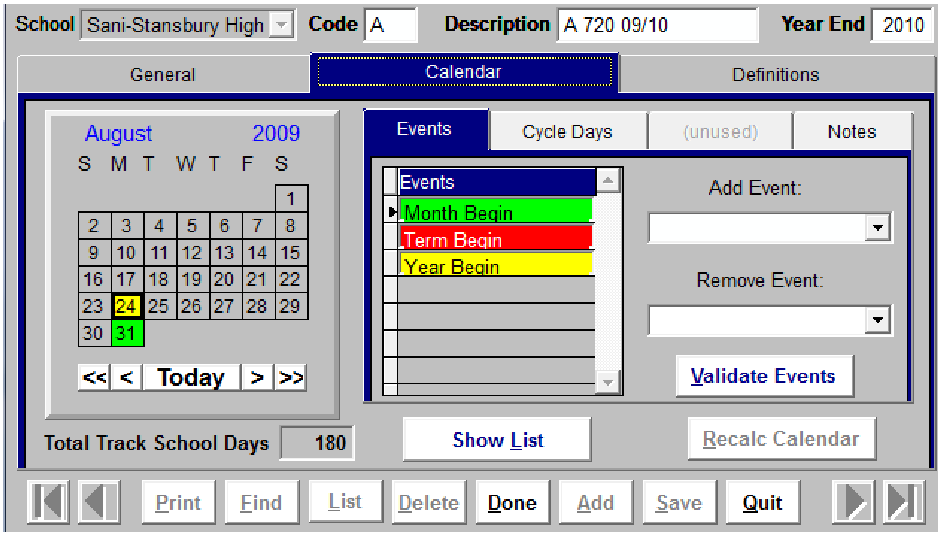
To set the terms, highlight the term in the left-hand column and use the arrows to move the term to the right-hand column.

Defining Cycle Days



- The number of Cycle Days that are available for defining is based on the number of cycle days you defined on the general tab.
- Choose the color to assign to each cycle day.

Creating Events



Creating Events

You will need to set up all of your calendar events for the year, including when the term begins and ends, holidays, in-service days, etc. **The Total Track School Days must equal 180. There CANNOT be more than 180 days.**

- Go to the **Calendar** tab > **Events**.
- Press **Edit**.
- Highlight the date for which you would like to add an event.
- On the **Add Event** drop-down, select the event you would like to add.
- Press **Save**. You don't need to press Save after each entry, but rather you can press Save when you have finished entering all the events, but before you move off of the screen.

Term Markers

Enter your **Term Begin** and **Term End** markers. If your school uses semesters, you would need to add two Term Begin and two Term End markers (one set for each semester). If your school uses the quarter system, you would need four Term Begin and four Term End markers. Make sure that when you put in a Term End marker, that the very next day has a Term Begin marker, even if it is on a weekend. If there are days in the calendar that don't fall into any term, reports will not work properly on those days.

NOTE: Each beginning marker must have a matching end marker.

Deleting Events

- Go to the **Calendar** tab > **Events**.
- Press **Edit**.

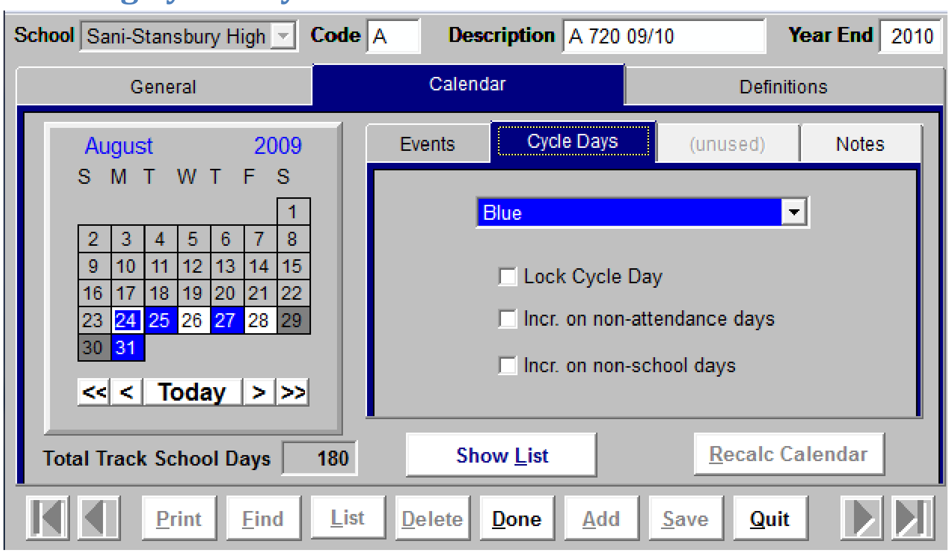
- Highlight the date which has the event you want to delete.
- Choose the event you would like to delete from the **Remove Event** drop-down.
- Press **Save**.

Other Options on This Screen

- **Validate Events** – Select this button to ensure that your entries are valid.
- **Show List** – Select this button to view in a list format the entries that have been added to the calendar.
- **Recalc Calendar** – Select this button if you make changes to the calendar and would like it to be recalculated.

When all changes have been made, press **Save**.

Creating Cycle Days



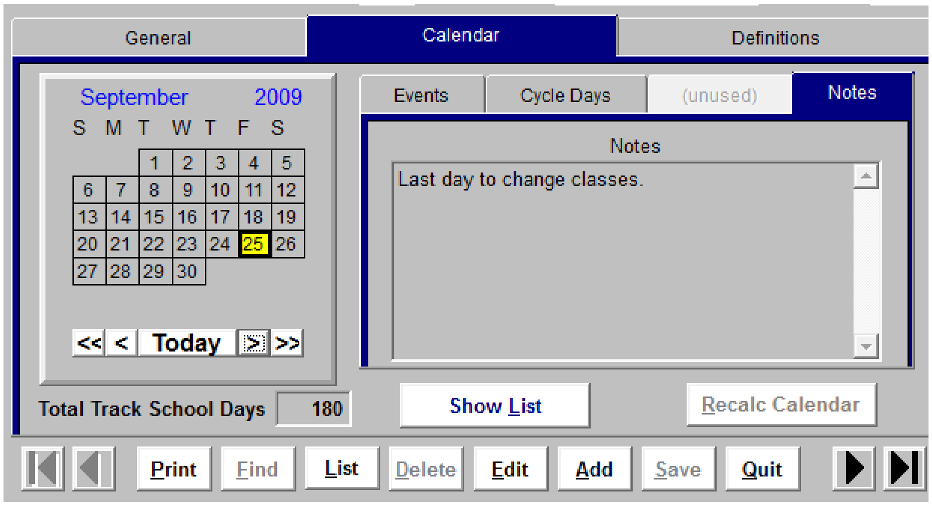
If you've set your first and last school days on the general tab and entered all your events, the system will automatically assign all your cycle days to your school calendar.

Other Options on This Screen

- **Lock Cycle Day** – If the starting point for the cycle day schedule does not correspond to the first day of school, the cycle may be changed to begin at any point in the cycle using the **Lock Cycle Days** field. To do so, follow these steps:
  - Select the date for the starting point.
  - Select the cycle day from the drop-down list.
  - Checkmark the **Lock Cycle Day** box.
- **Increment on non-attendance days** – If the school schedule skips a cycle day on days when no attendance is taken, such as teacher in-service days, checkmark "Incr. on non-attendance days".

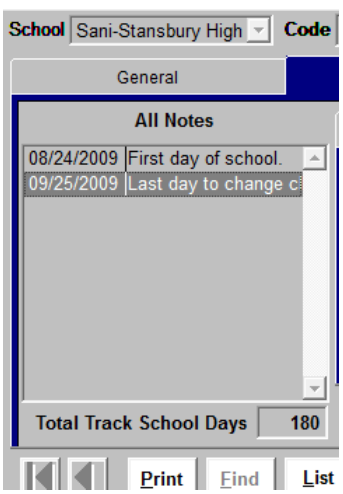
- **Increment on non-school days –** If the school schedule skips a cycle day on a holiday, checkmark "Incr. on non-school days".
- When you have finished, press **Save**.

Entering Notes



Comments may be recorded for any day of the school year. Days that have comments recorded will be highlighted in yellow on the Notes tab.

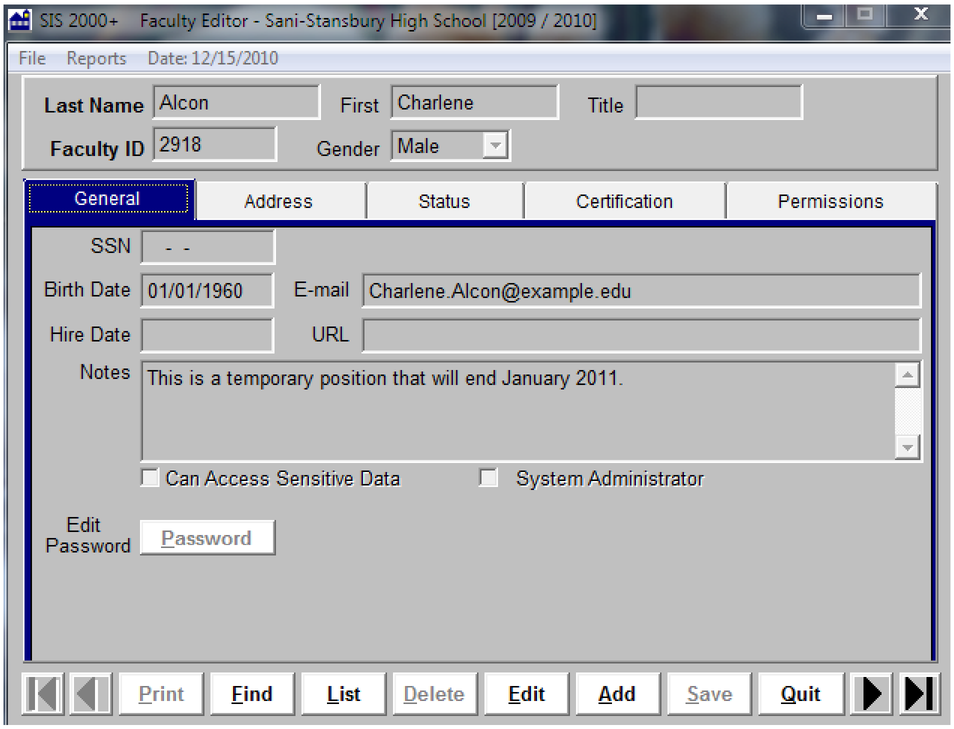
- Highlight a day for which you would like to enter notes.
- Press **Edit**.
- Enter the note.
- Press **Save**.
- Press **Show List** to see all the notes that have been entered.



Faculty Editor

You will need to create a faculty record for each user. DO NOT change the fsa record, as that is the login USOE uses.

To create a faculty record, go to System > Faculty. The following screen will display.



Faculty members are defined as teachers, administrators, clerical staff, food service workers, counselors, and any personnel in the school who require access to the SIS 2000+ system. The **Faculty Editor** is where basic demographic information, such as name, address, status, contacts, and permissions/passwords is entered and maintained. The faculty database is an integral part of the scheduling process. Therefore, at minimum, all *teachers* must be entered into the system and be assigned to the appropriate tracks before any scheduling can take place.

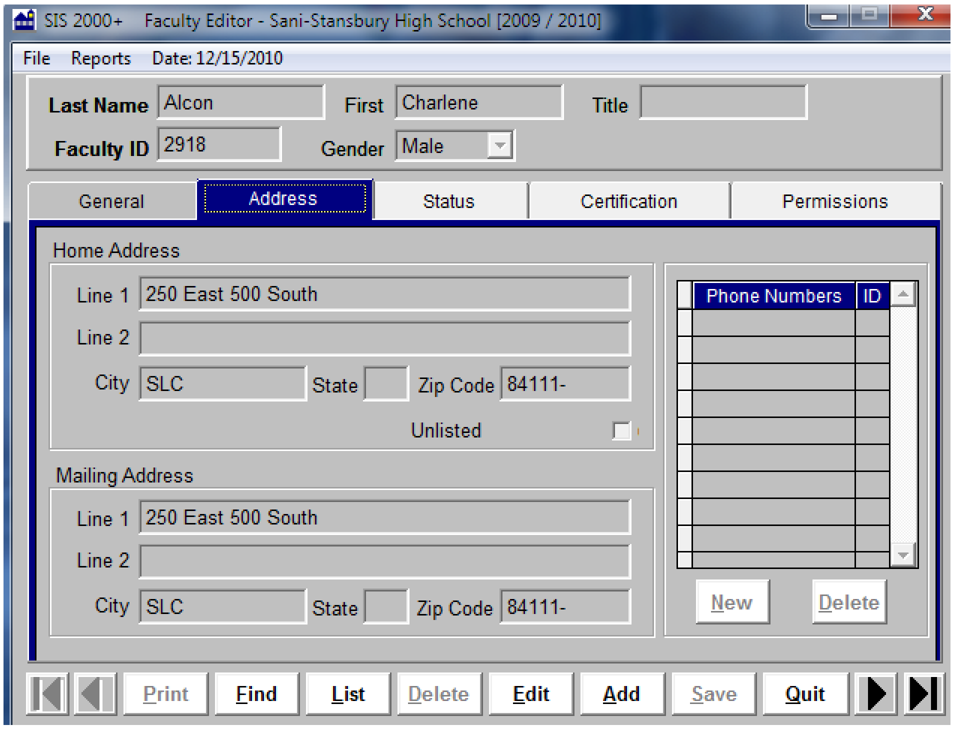
Adding a New Faculty Member

General Tab

- Press **Add.**
- Enter the **Last Name, First Name,** and **Gender.**
- The system will automatically assign a **Faculty ID**.
- Enter data in the other fields as desired.
- If you want the faculty member to be able to send emails, enter that person's **E-mail** address.

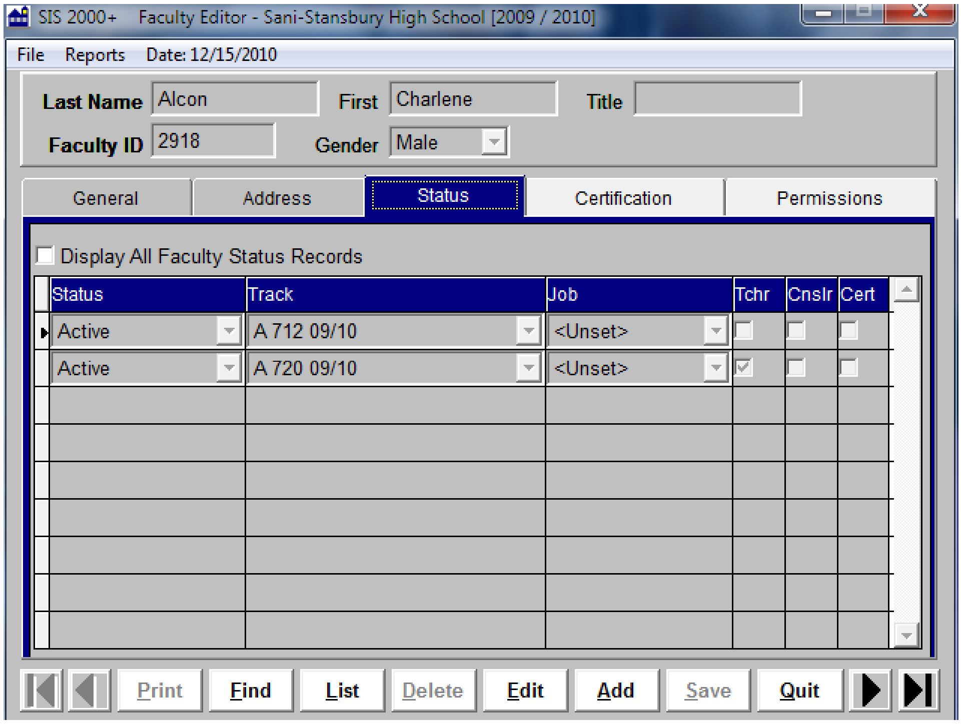
- **URL –** if the faculty member has a web site, enter the URL in this field.
- **Can Access Sensitive Data –** place a checkmark in this box if the faculty member needs to access sensitive data.
- **System Administrator –** place a checkmark in this box if the faculty member is a system administrator.

Address Tab



- Enter address data for the faculty member.

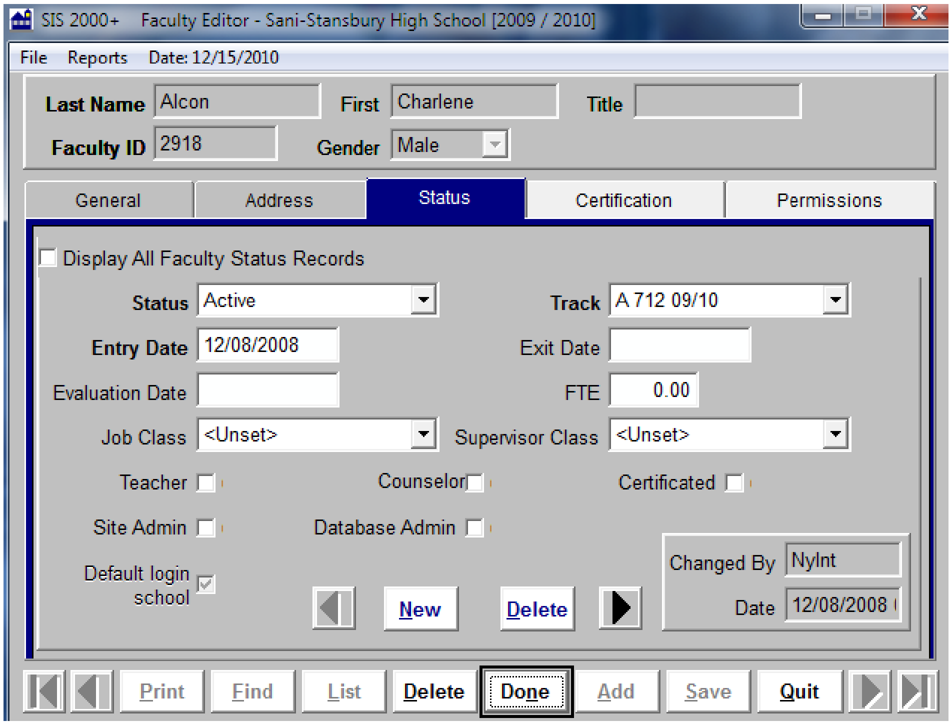
Status Tab



The **Status** tab is where you allow a faculty member to access a track. When you create a new faculty member, they will automatically be granted status to access the current track.

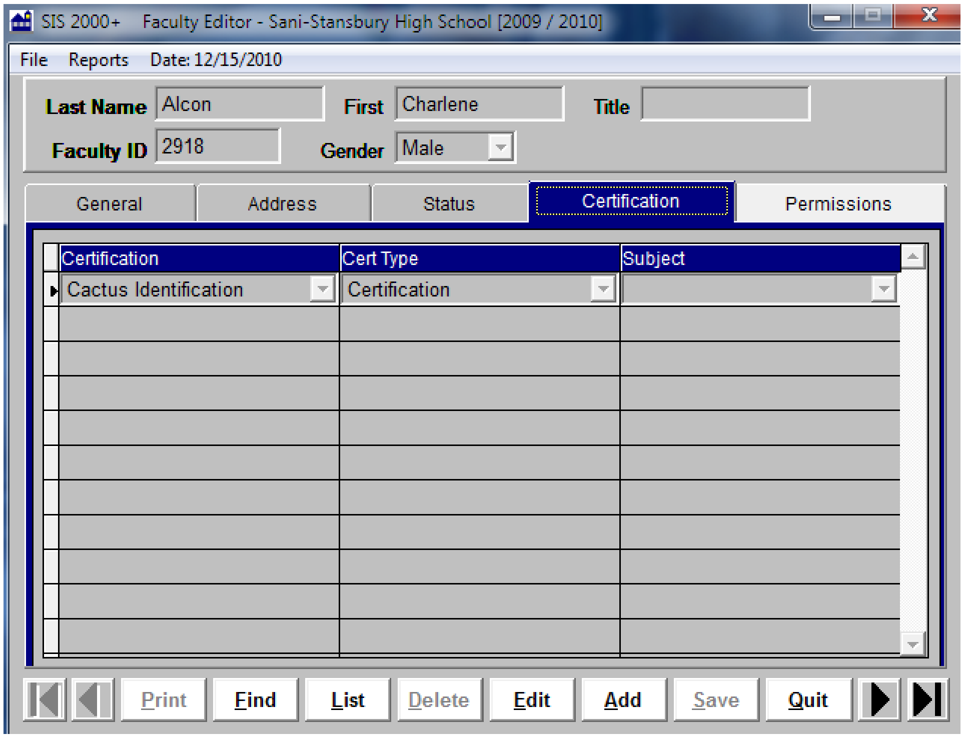
If you need to allow the faculty member to see other tracks, follow these steps:

- Highlight an existing row and press **Edit** to see the following:

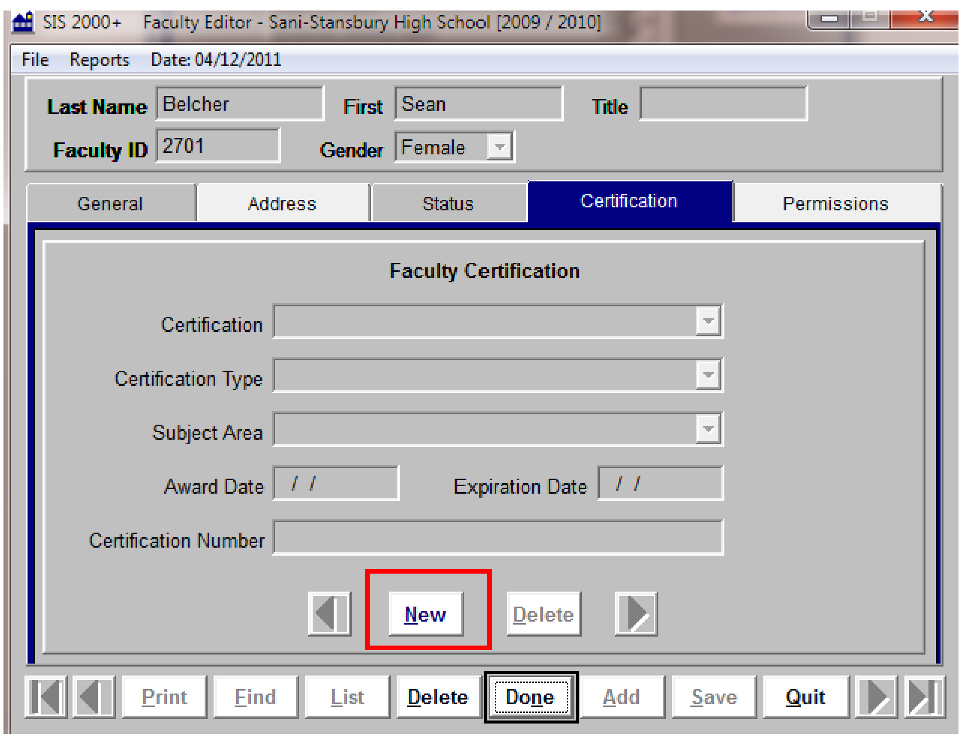


- Press **New**.
- From the **Track** drop-down, select the track you would like to add to the status.
- Enter an **Entry Date**. This is typically the first day of employment or when the user needs access.
- Checkmark any appropriate choices.
- Press **Save**.

Certification tab



Certification data is information on a faculty member's professional credentials. To add the certification data for a faculty member, while on the Certification screen, press **Edit.** The following will display.

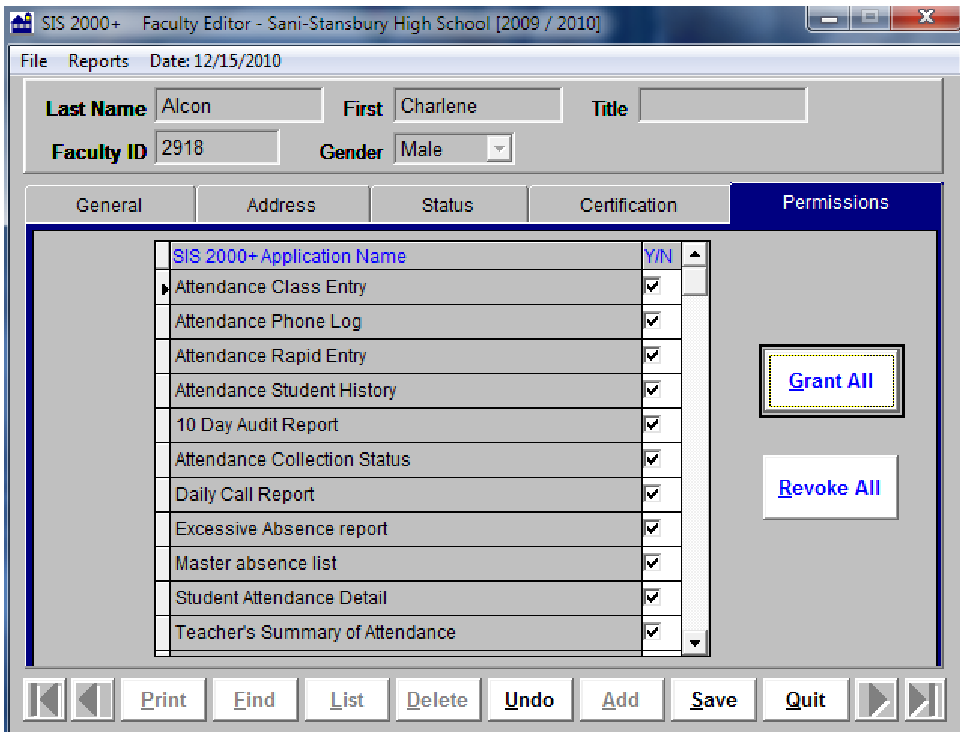


Press **New** which will put the screen in Edit mode. Enter data in the fields as described below.

- **Certification –** from the drop-down, choose "Cactus Identification".
- **Certification Type –** from the drop-down, choose "Certification".
- **Certification Number –** enter the teacher's Cactus number.

All three of these fields need to have data in them or you will get clearinghouse errors.

Permissions tab



The **Permissions** module is where you will give permission for a user to access features in FoxPro. If a user will only be using SIS on the Web, you don't need to select any permissions here.

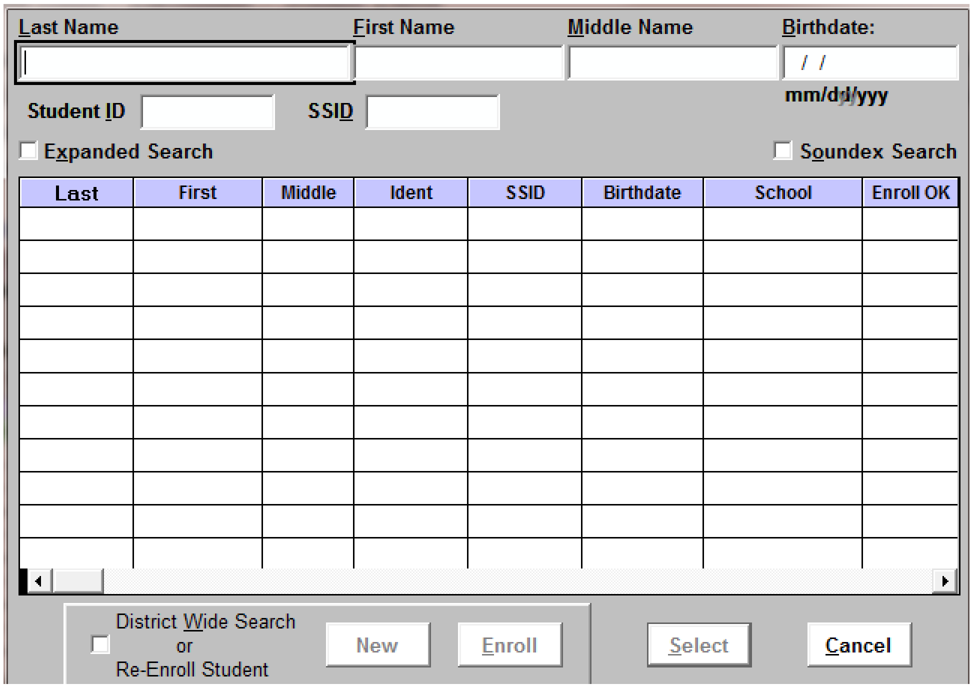
NOTE: If the faculty member was granted System Administrator status on the General tab, then that faculty member automatically has access to all SIS 2000+ applications and functions. In such a case, the Permissions on this screen are not applicable.

- Checkmark each permission you would like a user to access.
    - The permissions in this screen only relate to FoxPro. Permissions for SIS on the Web are entered in Control Master when logged into the SIS website.
- Press **Save**.

Student Editor

The Student Editor screen is where all student demographic data is input and updated. This information includes name, student ID, SSID, gender, phone numbers, addresses, ethnicity, race, birthdate, track, enrollment dates, exit dates, teacher/advisor, grade, and contacts.

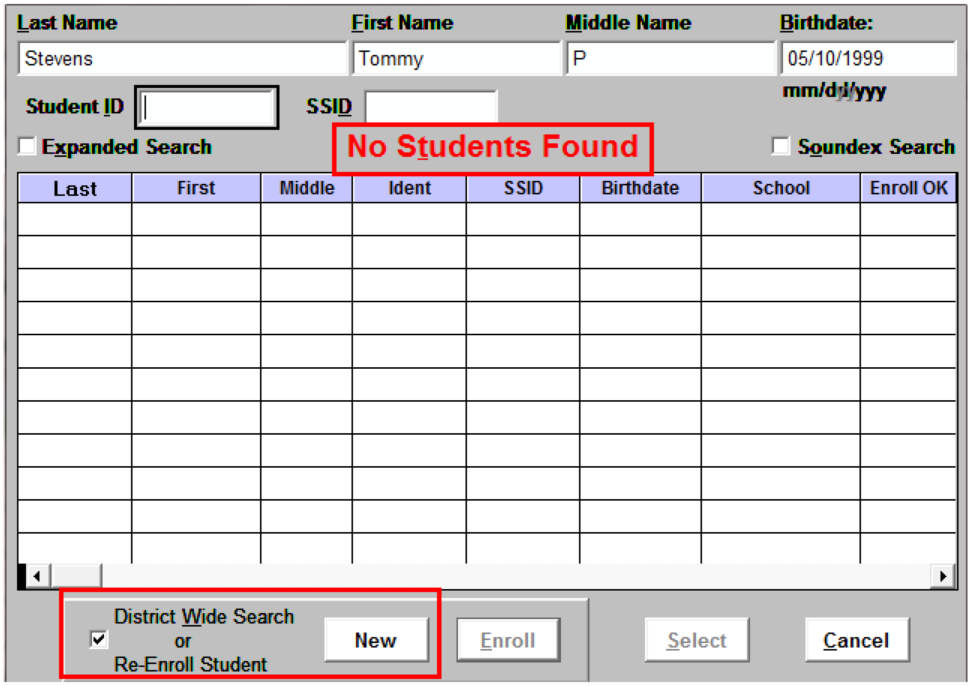
Go to Enrollment > Student Editor. The following screen will display.



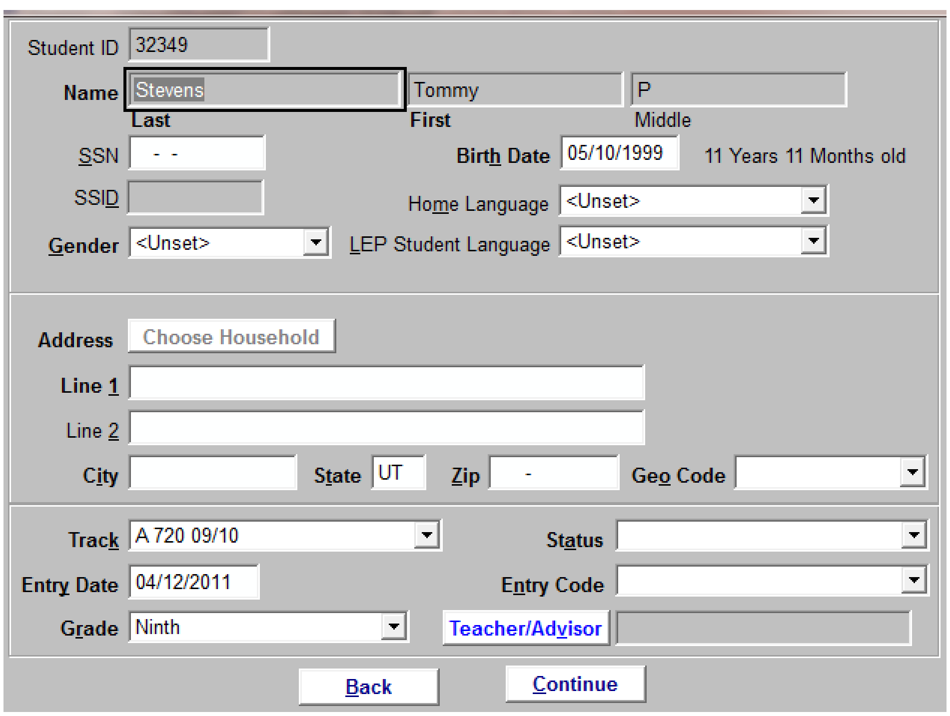
This screen will appear each time you select "Student Editor". It allows you to find a current student, determine whether a student record exists in the district database prior to adding a student, re-enroll a prior student, or add a new student.

Adding a New Student

- If you are adding a new student rather than looking for an existing student, type in the student's **Last Name**, **First Name**, **Middle Name**, and **Birthdate**.
- If the student is not in the system, you will see a message that the student is not found, as shown below.

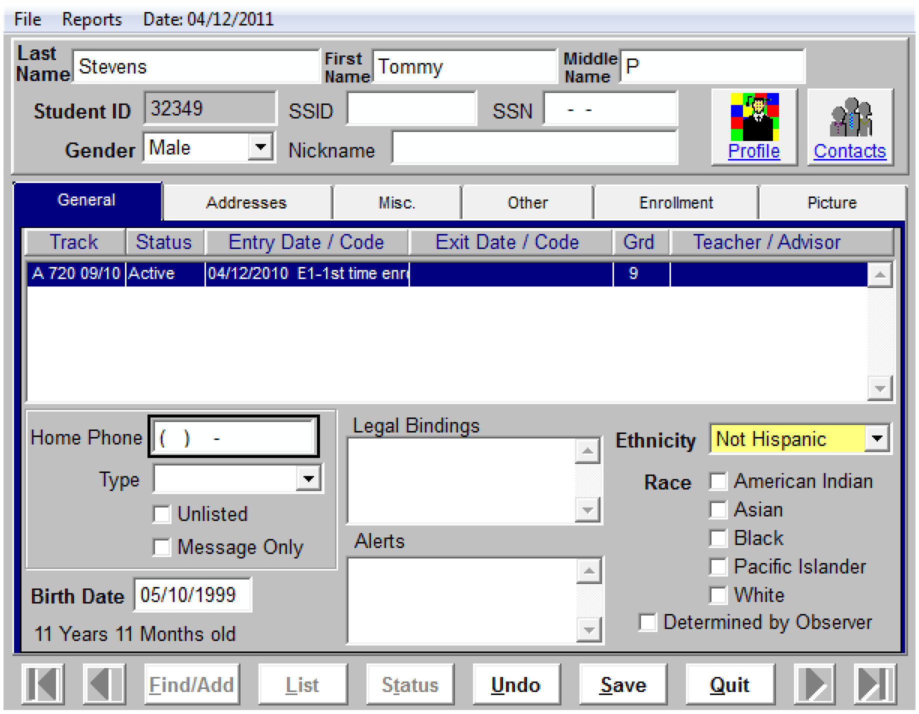


- Tab out of the **Birthdate** field and place a checkmark next to "District Wide Search or Re-Enroll Student".
- The **New** button will be made available. Press the **New** button. The following screen will display.

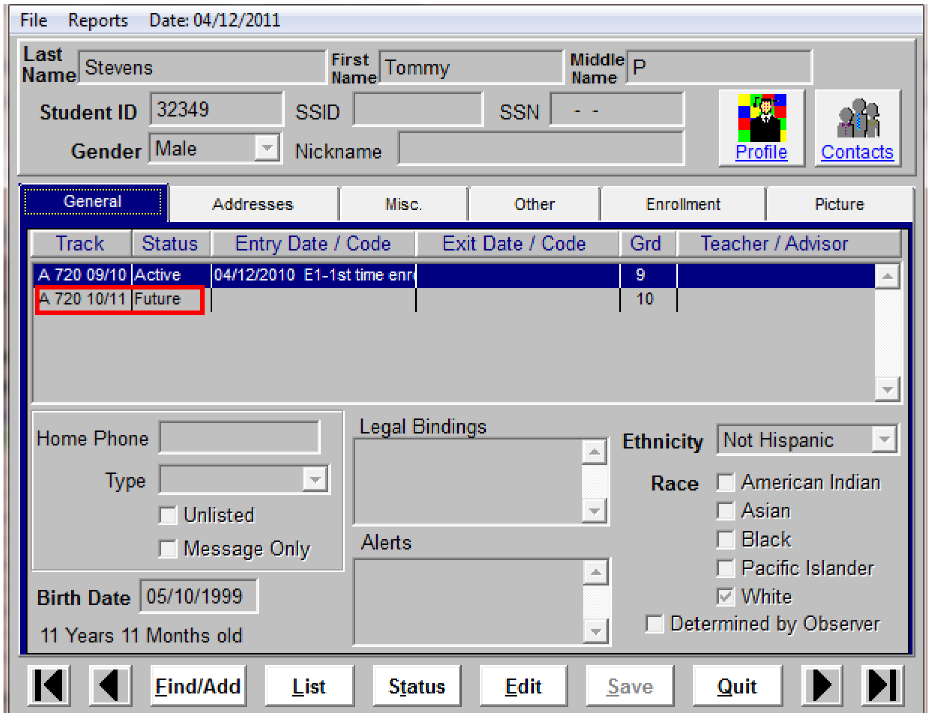


- Enter data into the appropriate boxes.

- The required fields are:
  - Gender
  - Address
  - Geo Code
  - Status
  - Entry Date
  - Entry Code
- Once all the required data is entered, press **Continue**. The following screen will display.



- Enter the **Home Phone** for the student, as well as **Ethnicity** and **Race**.
- When you press **Save**, if a future track has been created in the Track Editor, the student will automatically be enrolled in that track as a future student, as well as in the current track, as displayed below.

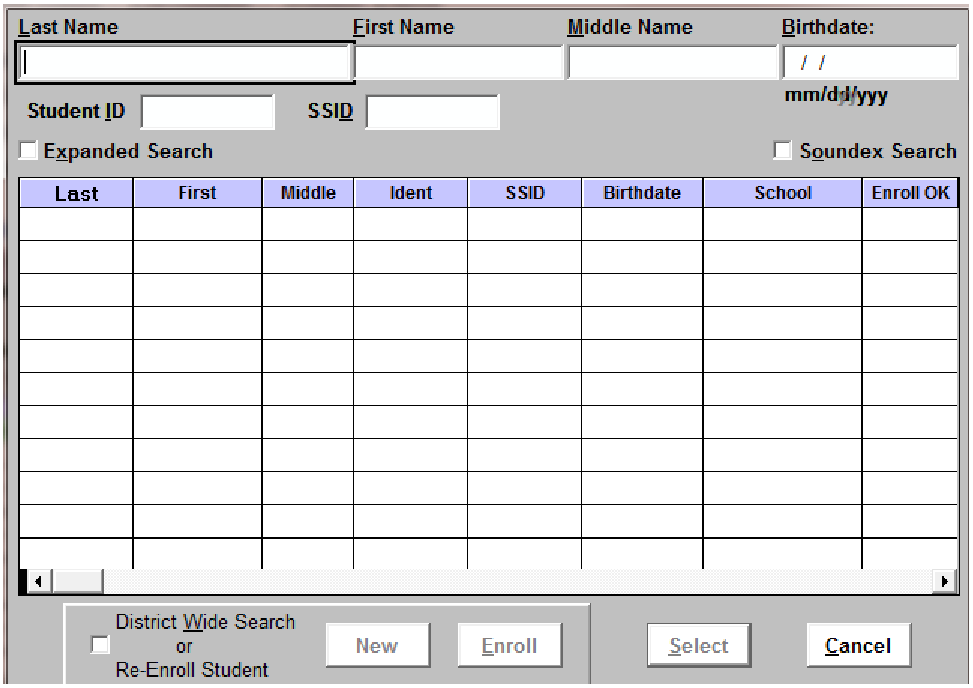


- Enter data in the other tabs as needed. Some fields you should make sure and fill out are listed below.
  - **Address tab – District of Residence** and **School of Residence**.
  - **Misc tab – Restricted Information**, if applicable and **Email**, if you plan on emailing the student.
  - **Other tab** –if "American Indian" is selected on the General tab, you will need to select a **Tribal Affiliation** on the Other tab.

If Students were Imported into the System

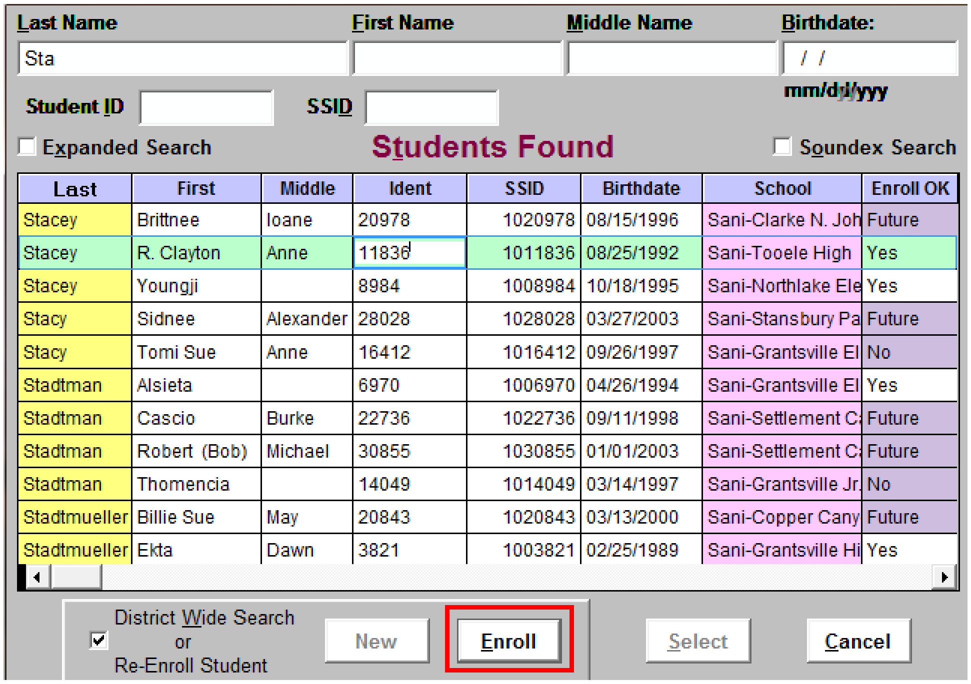
If your student demographics were imported into your new database, you have fewer steps to follow to get the students enrolled.

Go to Enrollment > Student Editor. The following screen will display.



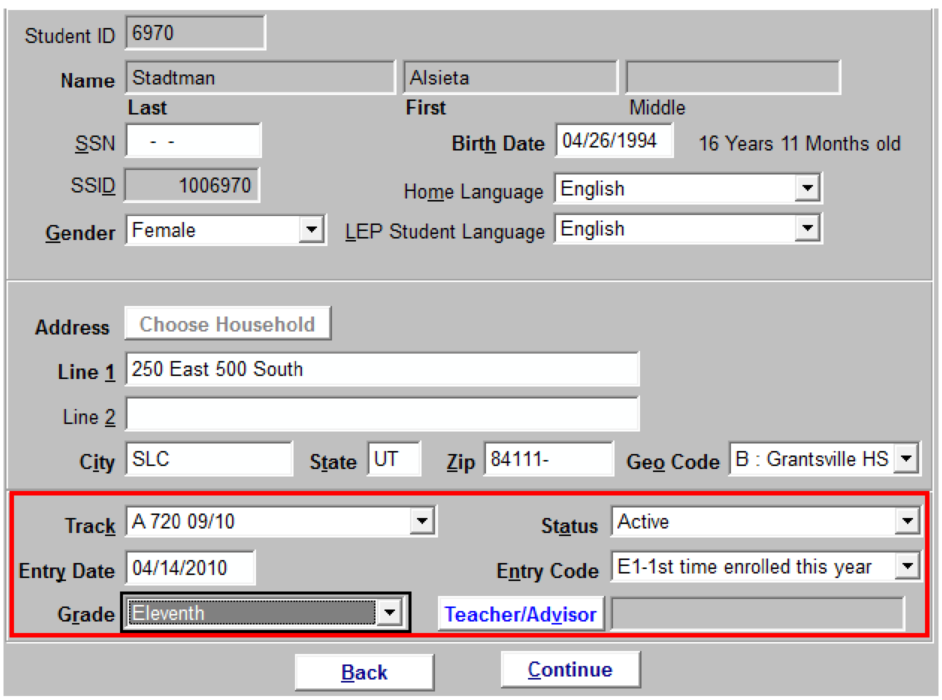
This screen will appear each time you select "Student Editor". It allows you to find a current student, determine whether a student record exists in the district database prior to adding a student, re-enroll a prior student, or add a new student.

- If you're enrolling a student already in the system, place a checkmark next to "District Wide Search or Re-Enroll Student".
- Type in the first few letters of the student's **Last Name** and **First Name**. A list of all matches will appear in the screen.

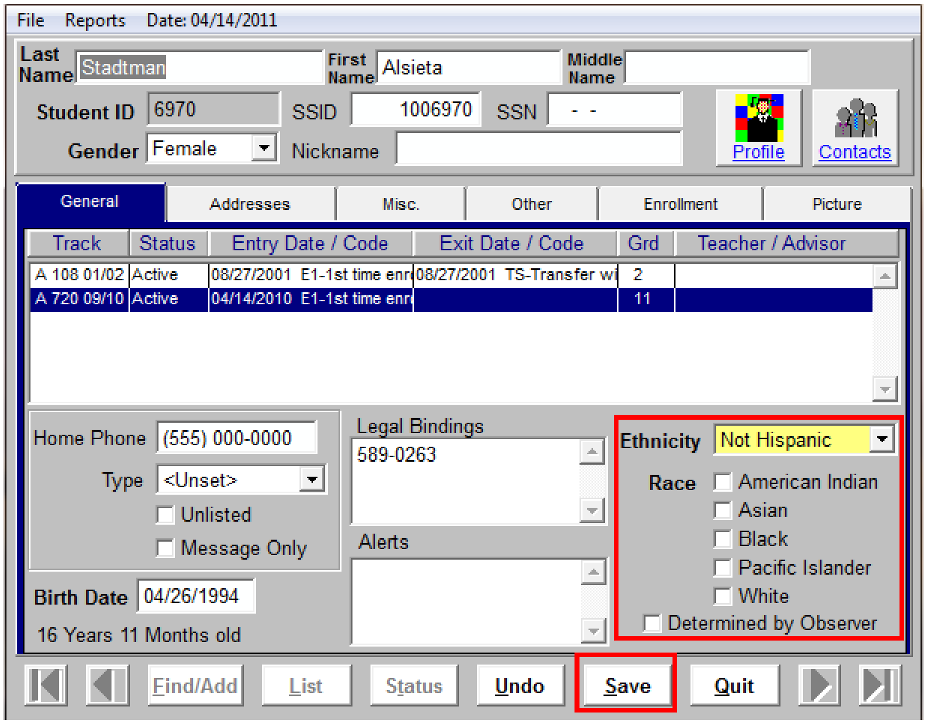


Last	First	Middle	Ident	SSID	Birthdate	School	Enroll OK
Stacey	Brittnee	Ioane	20978	1020978	08/15/1996	Sani-Clarke N. Joh	Future
Stacey	R. Clayton	Anne	11836	1011836	08/25/1992	Sani-Tooele High	Yes
Stacey	Youngji		8984	1008984	10/18/1995	Sani-Northlake Ele	Yes
Stacy	Sidnee	Alexander	28028	1028028	03/27/2003	Sani-Stansbury Pa	Future
Stacy	Tomi Sue	Anne	16412	1016412	09/26/1997	Sani-Grantsville El	No
Stadtman	Alsieta		6970	1006970	04/26/1994	Sani-Grantsville El	Yes
Stadtman	Cascio	Burke	22736	1022736	09/11/1998	Sani-Settlement C	Future
Stadtman	Robert (Bob)	Michael	30855	1030855	01/01/2003	Sani-Settlement C	Future
Stadtman	Thomencia		14049	1014049	03/14/1997	Sani-Grantsville Jr.	No
Stadtmueller	Billie Sue	May	20843	1020843	03/13/2000	Sani-Copper Cany	Future
Stadtmueller	Ekta	Dawn	3821	1003821	02/25/1989	Sani-Grantsville Hi	Yes

- Select the appropriate student and press **Enroll**. The following screen will display.



- It is important to select the correct **Track, Grade** and **Entry Date.**
- Enter a **Status** and an **Entry Code.**
- Press **Continue** and the following screen will display.



- Select a **Race** and press **Save**.
- Enter data in the other tabs as needed. Some fields you should make sure and fill out are listed below.
    - **Address tab – District of Residence** and **School of Residence**.
    - **Misc tab – Restricted Information**, if applicable and **Email**, if you plan on emailing the student.
    - **Other tab –**if "American Indian" is selected on the General tab, you will need to select a **Tribal Affiliation** on the Other tab.

Run the SSID Process

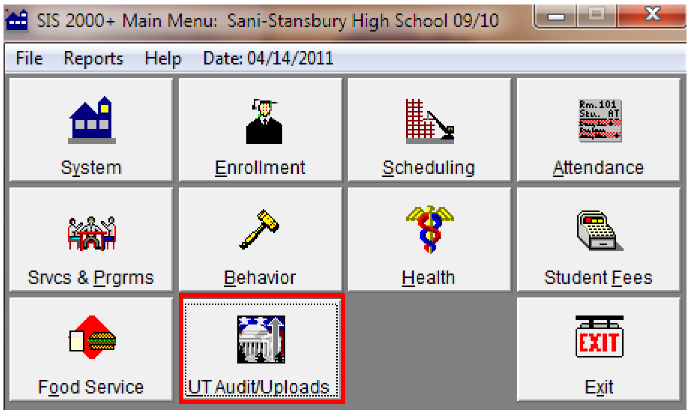
Each student in Utah has a unique SSID number. This number is found on the General tab of the Student Editor screen. The SSID Helpdesk can help LEA's with issues relating to the SSID number.

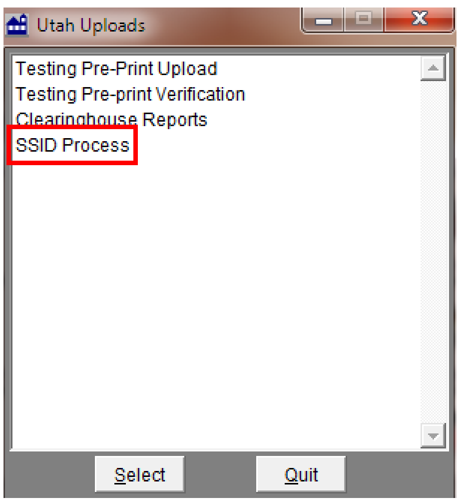
Once all the students have been entered and enrolled in FoxPro, you will need to make sure the correct SSID number is associated to each student. SIS 2000+ provides a module where you can:

- Retrieve SSID numbers for students who are in the State system, but don't have an SSID number within SIS 2000+.
- Retrieve SSID numbers for students who have not yet had one created on the state level.

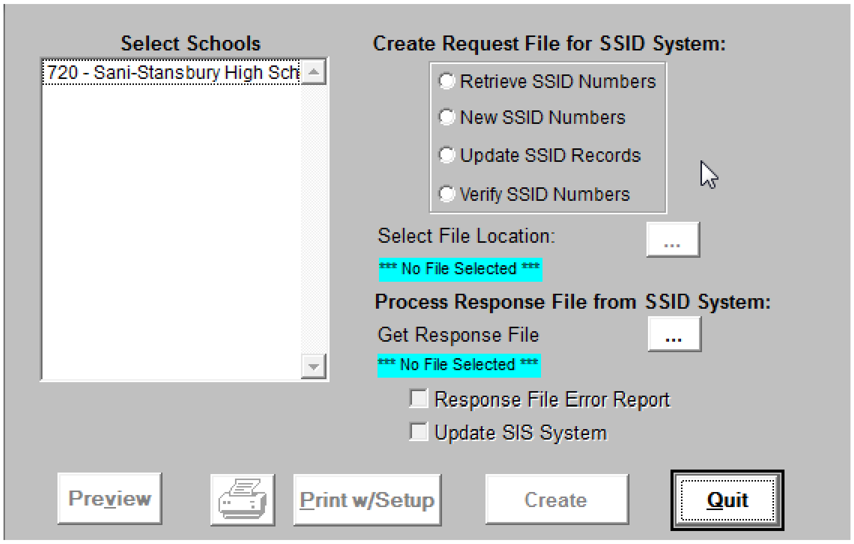
- Update SSID records when a student's demographics have been modified.
- Verify SSID numbers, which should be run before doing pre-prints.

To access this module, click on **UT Audit/Uploads** > **SSID Process**.



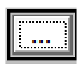


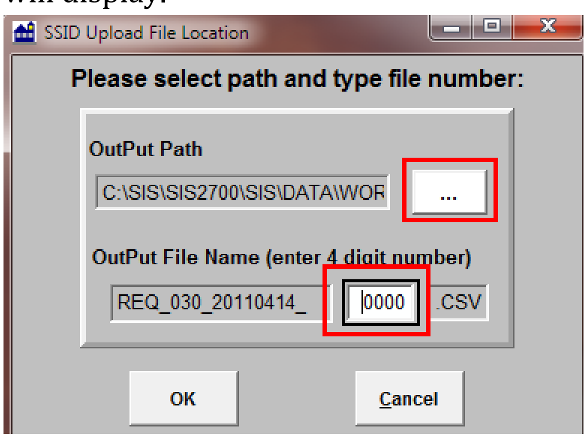
The following screen will display.



NOTE: It is important to go through all four processes, in order.

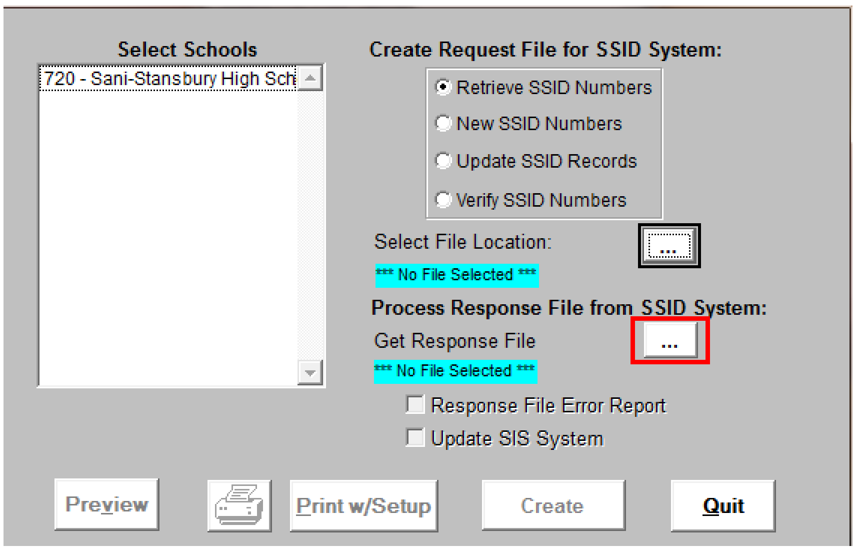
Retrieve SSID Numbers

1. Highlight the school name in the left-hand side of the screen.
2. Select "Retrieve SSID Numbers".
3. Click on the lookup icon  next to "Select File Location". The following screen will display.



4. Click on the three dots and choose where you would like the file to be saved. If you'll be requesting more than one file on that day, enter a number (like 0002) in the appropriate field, to differentiate files.
    a. The file that will be created is what you will be uploading to the SSID site.
5. Once you've filled out the Output file screen, press Create, to have the file created.
6. SIS will grab all students missing an SSID number and create a csv file. This file will begin with "REQ", meaning it is a request file.

7. Log in to SSID and upload the REQ file. You may need to run the file through the SSID Validation tool first. (If you have questions about this part of the process, you'll need to contact the SSID Helpdesk.)
8. Once you've uploaded the Request file to SSID's site, SSID will then create a Response file. This response file will have a filename that is the same as the filename for the request file, except it will start with "RESP" instead of "REQ".
9. You will place this RESP file in a location on your local computer.
10. Go back into SIS 2000+. You will need to map the "Get Response File" lookup to that location. Instructions for that are listed below.
    a. This Response file will contain SSID numbers for the students that were listed in your Request file.
    b. Go back into the UT Audit/Uploads > SSID Process screen.



    c. Highlight your school on the left side of the screen.
    d. Click on the three dots next to "Process Response File from SSID System:" and navigate to where you saved the Response file.
    e. Checkmark "Update SIS System".
    f. Press Update SIS
11. You can also select "Response File Error Report". This report will give you a list of students who did not meet the criteria for the Request File you processed. Perhaps they are new Kindergarteners and don't have an SSID number yet.

New SSID Numbers

This function will get SSID numbers for students who have not yet had one created on the state level. Make sure to run "Retreive SSID Numbers" first, so that you don't end up with a student getting a new SSID number when they already have one on the state level.

1. Select "New SSID Numbers".
2. Choose a file location.
3. Press Create.
4. Follow the same steps as when Retrieving SSID Numbers.

Update SSID Records

This function is used when you've modified student names, birthdates, or genders. The file will update SSID with the information.

SIS automatically flags students who have had these changes so that they can go in a request file.

You will need to load the response file (like you did for Retrieving SSID Numbers and getting New SSID Numbers) as this file contains a marker indicating that the SSID system has been updated for this student. This marker will flip a flag in SIS 2000+ so that the student won't be in the next request file.

Verify SSID Numbers

This function is run before: testing preprints, October 1, December 1, and Year-End clearinghouse files are created.

This function will verify that SSID and SIS match. It will check the name, LEA data, birthdate, and gender.

While you are in the SSID system, you can view any errors found. You can fix the errors manually there. No response file is created.

District Courses

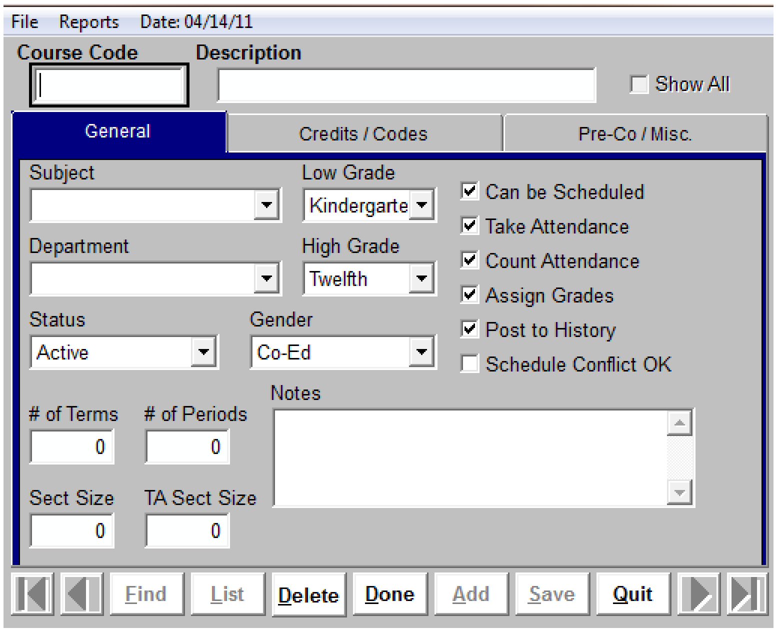
Once your faculty and student data has been entered, you will need to get your course information entered in preparation for scheduling. This is done in District Courses, which is found under **System** > **District Courses**.

The first step in this process is to create and maintain a set of courses. This is done through the District Courses module. Then the selected courses will be placed into the school's Master Schedule, and finally, students will be scheduled into the courses.

In the **District Courses** application, you are creating the default settings and definitions for the courses that will be offered at a school and edited in the school's Master Schedule.

Adding a New Course

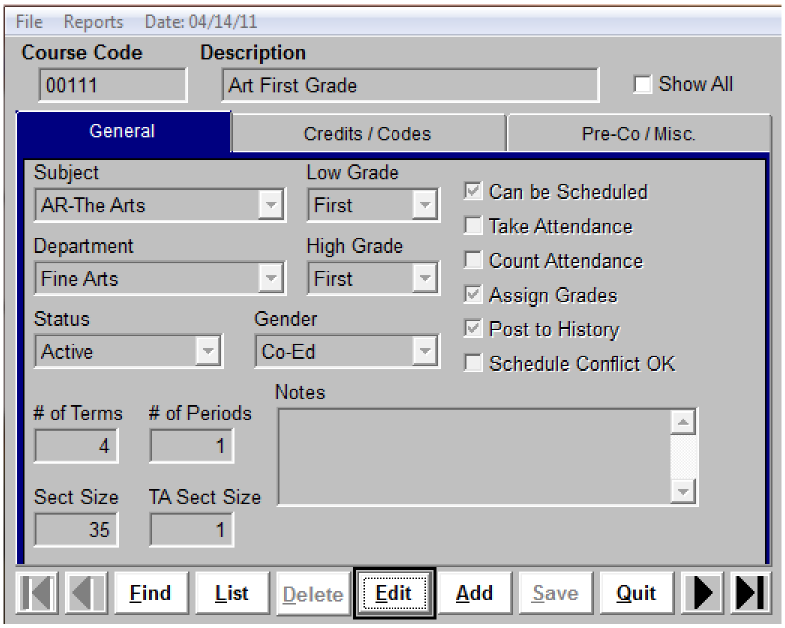
- Go to the Main Menu screen > System > District Courses.
- Press **Add**. The following screen will display.



- Create a **Course Code**. This code needs to be unique. Course Codes are user-defined and may be up to ten characters long. USOE recommends only using numbers when creating the Course Code, as letters cause problems when it is time to create the preprint files. It is recommended that you group codes according to subject. In other words, you may want all math classes to have codes that fall between 5000 and 5999 or all Language Arts classes to fall between 4000 and 4999.
    - To see if a code has already been used, place a checkmark next to **Show All**, which will allow all codes to be visible, rather than just the active codes.
    - Press **List** to see a list of all codes which are currently in use.
    - If you see a code that you would like to use, select it from the list and make sure the Status is set to “Active”.
- Create a **Description**.

Once the Course Code and Description have been created, you may move through each of the other screens. An explanation for each field is explained next.

General Tab

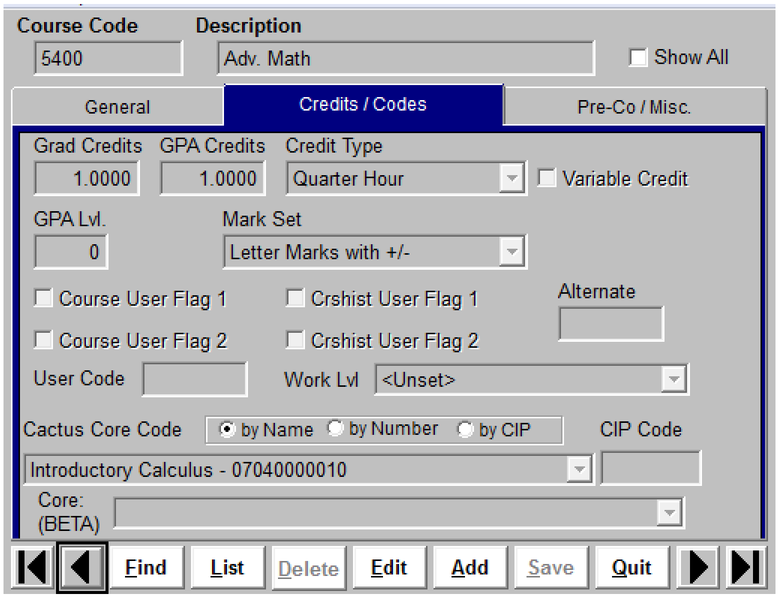


Use this screen to enter the "general" attributes of a course.

- **Subject** – the subject describes the general category of the course used in conjunction with graduation requirements. It is an academic "separation" of courses. The graduation requirements module looks at this field to determine how many units of a subject have been completed or count towards the defined graduation requirements. Courses with the same subject selected will be grouped together in the tally towards meeting graduation requirements.
- **Department** – select the department under which the course falls. This is an organizational "separation" of courses in a school. This is generally used for reporting purposes. For example, when you select the report Class Rosters and filter it by department.
- **Low Grade** – select the lowest grade level of students allowed into the course. This may be left <Unset> if there is no lower limit for the course (or the lower limit is the lowest grade level of the school).
- **High Grade** – select the highest grade level of students allowed to take the course. This may be left <Unset> if there is no upper limit (or the upper limit is the same as the highest grade level of the school).
- **Status** – typical statuses are:
  - **Active** – taught this year and the next year.
  - **Future** – taught next year, but not this year.
  - **Inactive** – not taught this year or next year.
- **Gender –** indicate if the course is offered for Male only, Female only, or if it is Co-Ed.
- **# of Terms –** the duration of a course in terms.

  - If your track has two terms (Semesters), and the course is an all-year course, the Number of Terms would be "2". If the course is a half-year course, the Number of Terms would be "1", meaning that the course would only last for one semester.
  - If your track has four terms and the course is an all-year course, the Number of Terms would be "4". If the course is a half-year course, the Number of Terms would be "2".
- **# of Periods –** the duration of a course in contiguous periods. For example, if you had a course that met for two periods in a row, and the same students were in both periods and they did not move when other students would normally switch classes, this would be set to "2".
- **Section Size –** the maximum number of students allowed to be enrolled in a section of the course. This information is utilized when scheduling students individually or when using the Student Loader (which is used to automatically build student schedules for next year).
- **TA Section Size –** the maximum number of teaching assistants allowed to be scheduled into the course.
- **Can be Scheduled –** whether or not this course can be scheduled automatically by the Schedule Loader during the Next-Year Mass Scheduling Process.
- **Take Attendance –** place a checkmark here if attendance is to be taken for this course. This integrates with the Attendance applications.
- **Count Attendance –** place a checkmark here if the attendance taken will be counted for state reporting purposes.
- **Assign Grades –** place a checkmark here if grades (marks) will be assigned to this course.
- **Post to History –** place a checkmark here if this course will be recorded in the student transcripts.
- **Schedule Conflict OK –** place a checkmark here if this course can be scheduled without conflict restrictions in the same time period as another course. This information is used both when individually scheduling a student and by the Student Loader. With this checked, a student can be scheduled for "Science" and "Health" at the same time, during the same period, on the same day, for example. If this is not checked, you will receive conflict messages when attempting to schedule this course concurrently with another course.
- **Notes –** this is a text field that can be used to enter anything you would like to note about the course.

Credits/Codes Tab

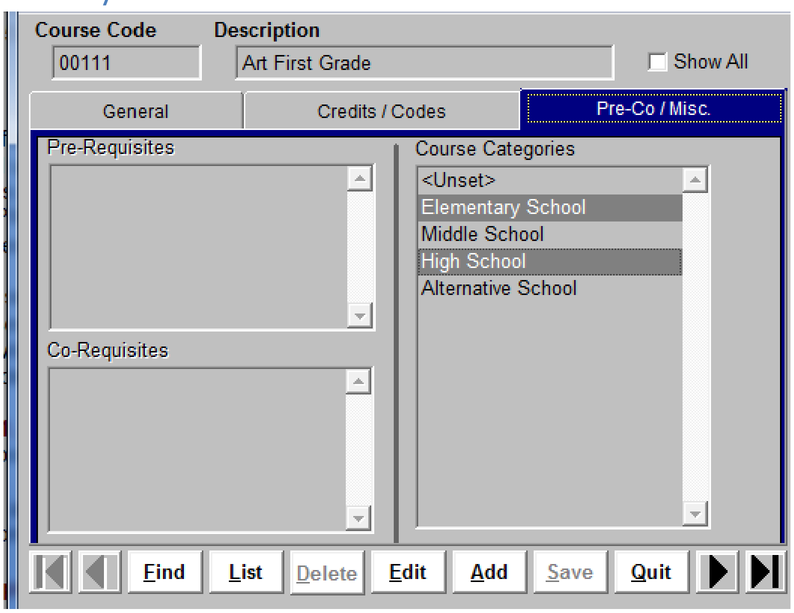


Use this screen to enter the credits earned for successful completion of the course. It is also used to define the codes associated with the course.

- **Grad Credits** – enter how many credits are granted by completion of this course towards graduation requirements.
- **GPA Credits –** the value used in calculating GPA. This value is normally the same as a credit, but it may be different.
- **Credit Type –** the type of credit awarded for this course. In the example above, 1 unit of credit is awarded for each successfully completed Quarter of the course.
- **Variable Credit –** place a checkmark here if variable credit is allowed in this course. This would allow schools to give partial credit for a course.
- **GPA Level –** level indicator for calculating GPA for weighted marks. Up to ten GPA Levels can be defined for a school. Level "0" is generally used as the default GPA that the majority of the courses will use. An Honors or Advanced Placement course, for example, may use a different GPA scale, so the GPA Level field would be used to indicate which scale is used. This is linked directly to the next field, "Mark Set".
- **Mark Set –** select which Mark Set your GPA Level will be pulled from for GPA calculations. You may have several Mark Sets defined, each with its own group of GPA Levels, so you must designate which Mark Set the GPA Level you just entered is coming from.
- **Course and Crshist User Flags –** user-defined logical (yes/no) fields for sorting purposes.
- **Alternate –** an alternate course code. For example, this could be an ID number from the state level that corresponds to the course.

- **User Code –** alternate course code defined by the user.
- **Work Level –** Electronic Data Interchange protocol sub-code.
- **Cactus Core Code –** use the drop-down to choose the appropriate Cactus Core Code for the course. It is important to enter a Cactus Core Code for each course. If you choose “Exclude From Clearinghouse”, make sure roll is taken in other periods, because this course won’t count towards attendance since it won’t go to the clearinghouse.
    - If you are an elementary school, you should have “Exclude from Clearinghouse” in all courses but homeroom. This is because only one period per day should have attendance taken and sent to clearinghouse.
    - You can do a search for the Cactus Core Code by Name, Number, or CIP (Classification of Instructional Programming). Select which one you would like to search by, then click the drop-down arrow to do your search.
- **CIP Code –** Classification of Instructional Program code using Federal Vocational Education protocol.

Pre-Co/Misc Tab

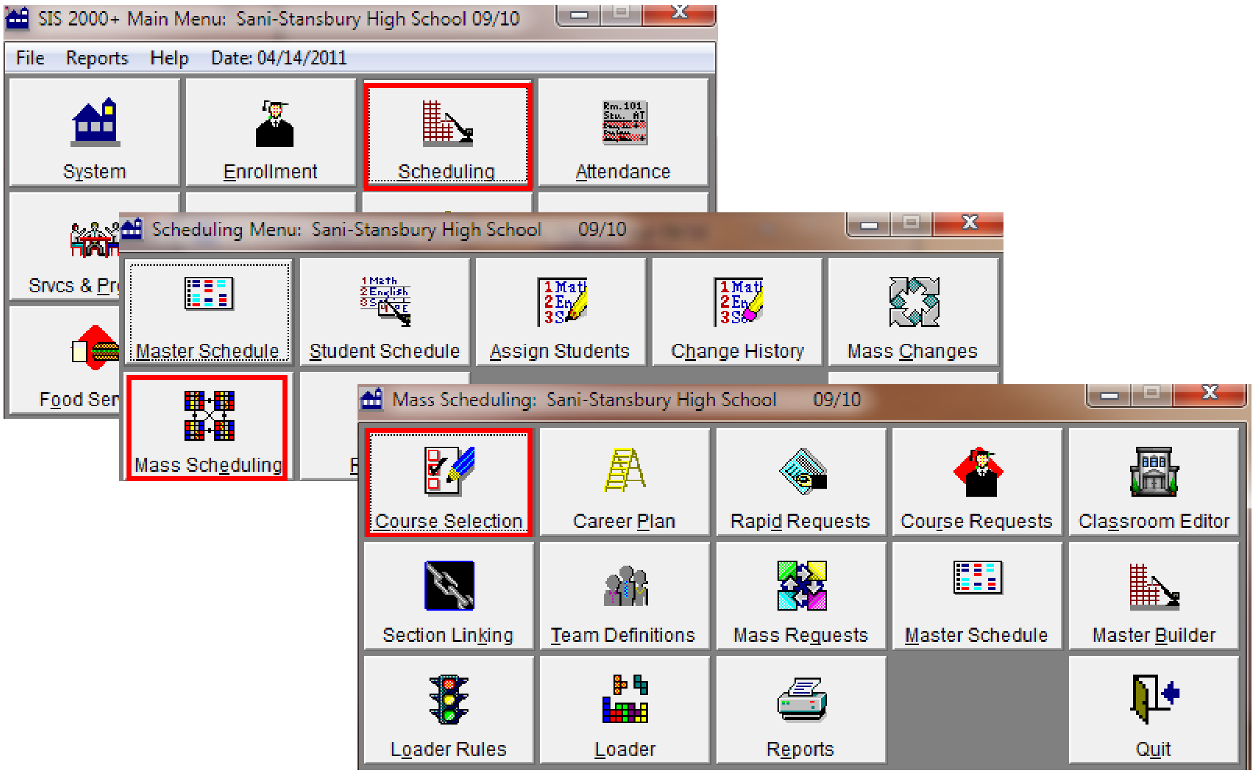


Use this screen to define Course Categories. The Pre-Requisites and Co-Requisites screens are not used at this time.

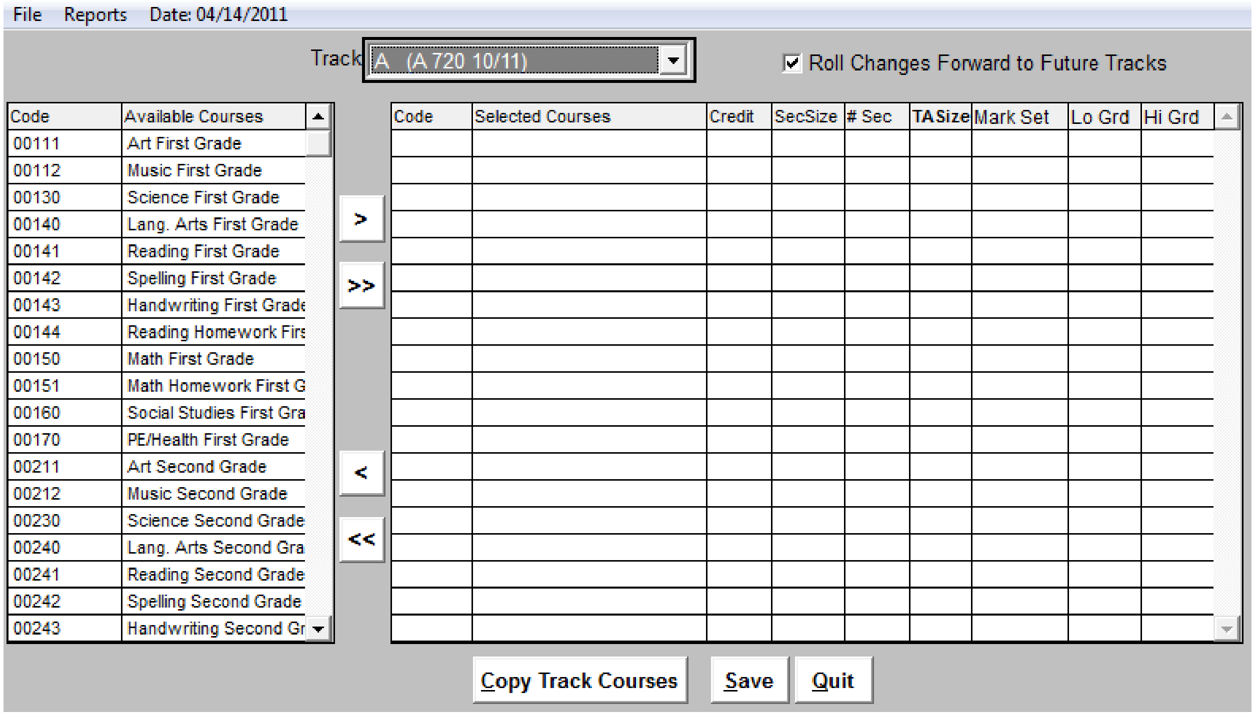
- **Course Categories** – select the type(s) of school(s) for which this course will be taught. You may select more than one by pressing the Ctrl key while clicking the school types in the list. Selecting data in this screen is not required.
- Press **Save**.

Course Selection

The Course Selection screen is where you decide which courses will be available in a specific track. To bring up the Course Selection screen, go to Scheduling > Mass Scheduling > Course Selection.



When you click on Course Selection, the following screen will appear.

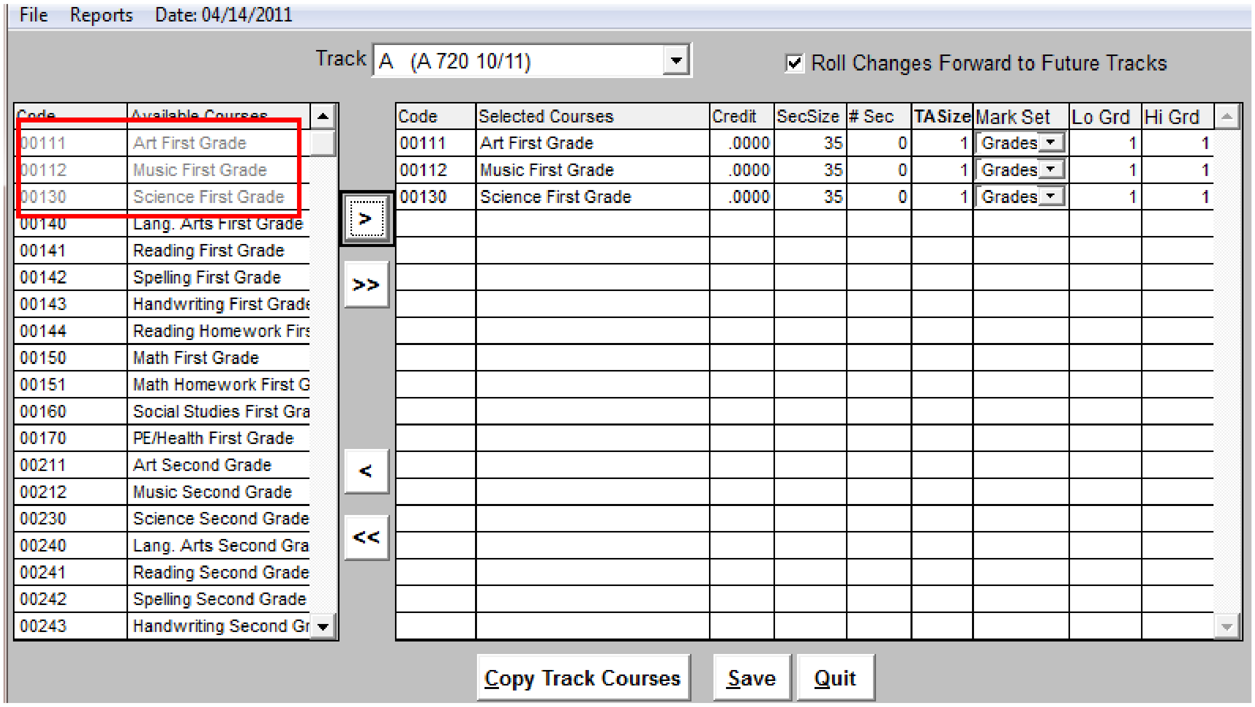


The left side of the screen is a list of all the courses that were created in District Courses. The right side of the screen is a list of the courses that have been selected to be available in the selected track.

Notice the selected track at the top of the screen. Make sure you are on the correct track before working in this screen.

To move courses to the right side screen, either click on the right-pointing double arrows to move all of the available courses over (you can then move back ones you don't want to include) or select individual courses and click the right-pointing single arrow to move them over. You can hold down the Ctrl key and select multiple courses at one time before moving them.

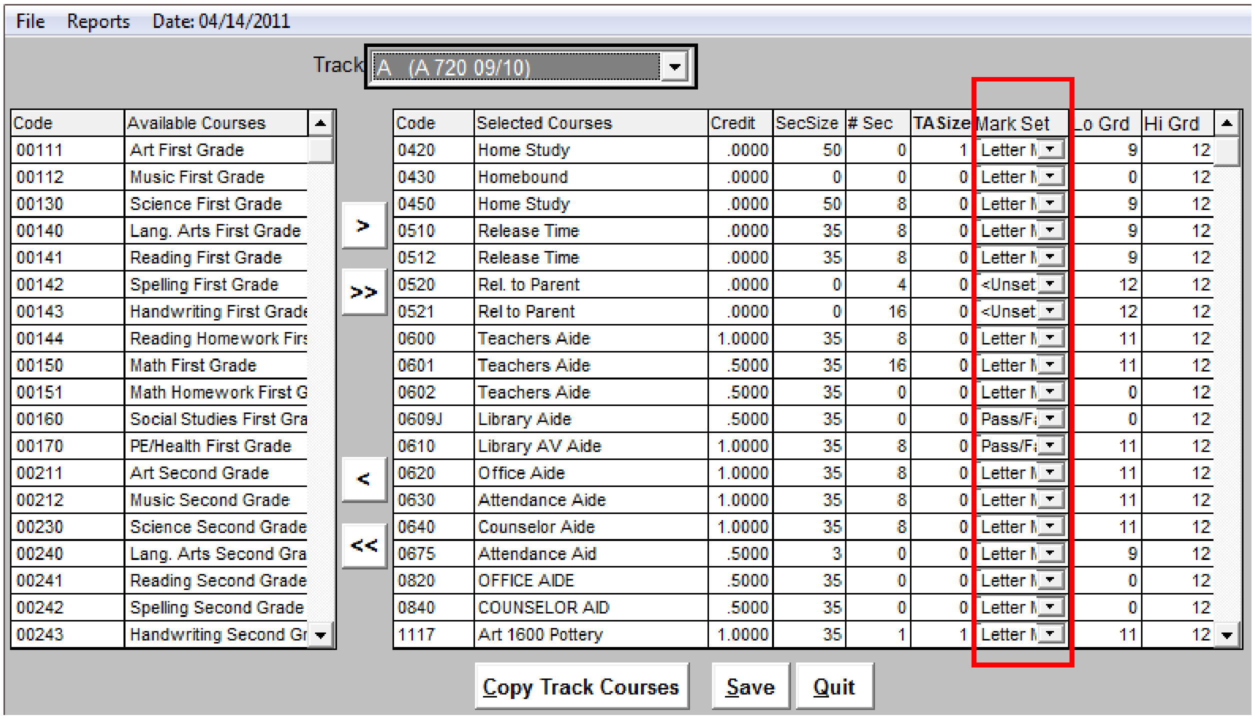
You will notice that after you've moved courses to the right side screen, those courses will still appear in the left side screen, but will be greyed out. This is to indicate that those courses have already been selected and moved over. See screenshot below for an example.



- When your courses appear in the right-hand grid, they have been successfully assigned to your track and are now available for scheduling.
- To "un-assign" a course from a track, you simply reverse the process and move the course back to the left-side grid.
    - When attempting to remove a course from a track, you will only be allowed to remove those courses that have not yet been used in other scheduling applications. If a course is unable to be removed, you will receive a message and will be prevented from moving it.

Other Options

Notice that there are several columns in the right-hand grid. The only column that you will need to worry about is **Mark Set**. This information is pulled from District Courses. When the teachers set up their Gradebooks, they will need to choose the same Mark Set for their courses as is assigned here. If they want to use a different Mark Set, you will need to change it in this screen. This should only be done before any grades are entered in the Gradebook.



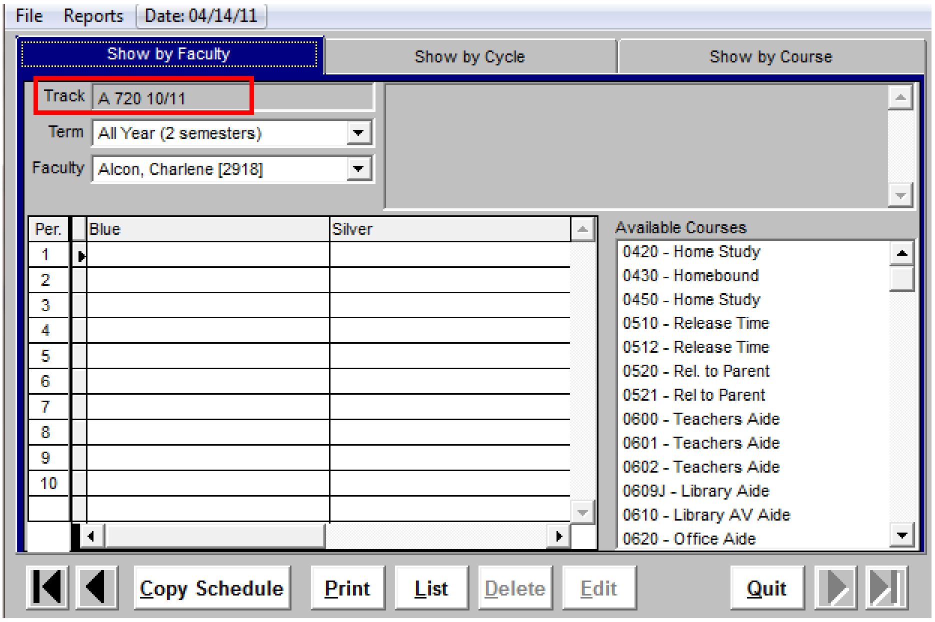
To edit the Mark Set, do the following:

- Click on the drop-down arrow under Mark Set for the specified course.
- Choose the Mark Set you would like.
- Press **Save**.

Master Schedule

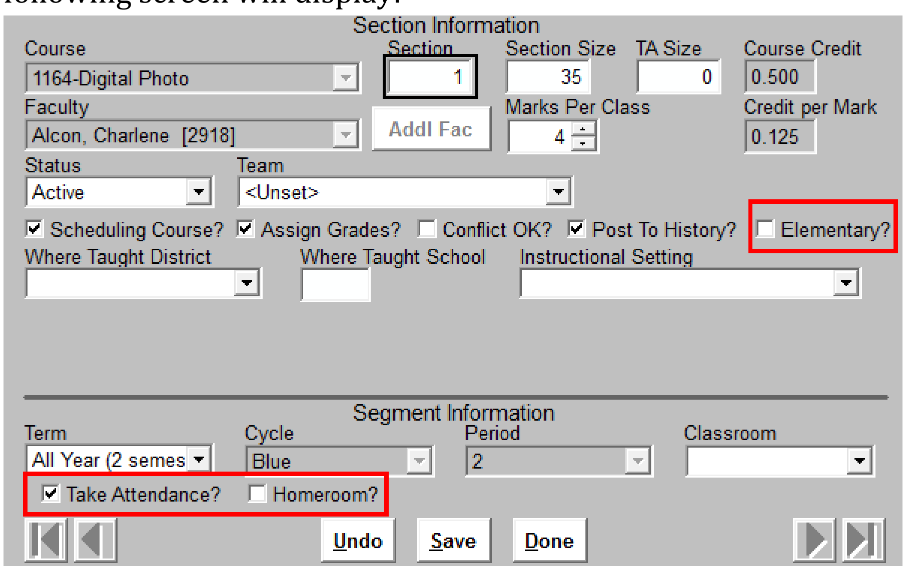
The next step in the scheduling process is to assign faculty members to the available courses. This is done in the Master Schedule screen.

To access the Master Schedule screen, go to Scheduling > Master Schedule. The screen will display as follows:



Make sure the correct **Track** is selected. If you need to change the track, press **List** and choose the correct track.

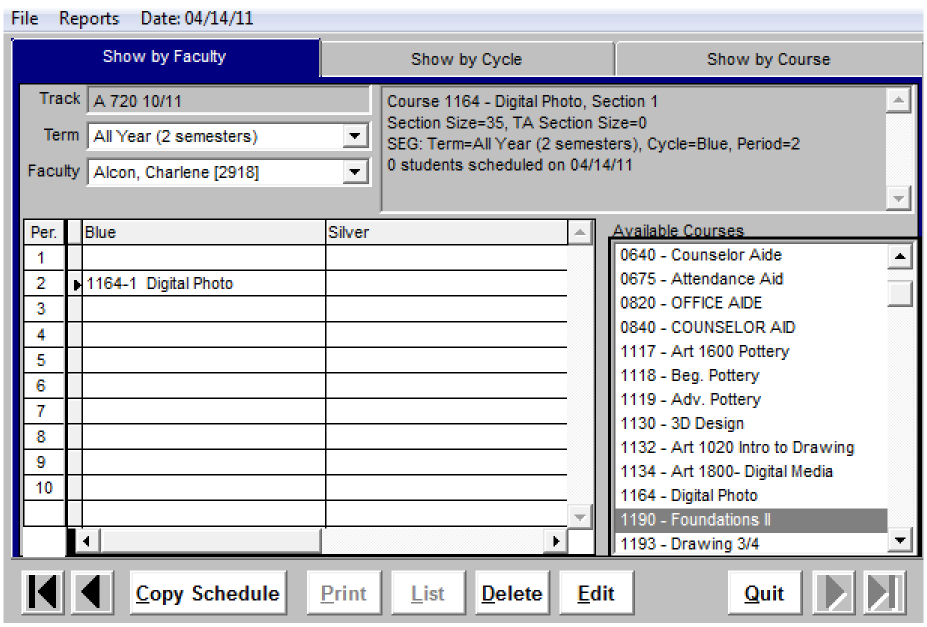
- To assign courses to a faculty member, make sure you are on the first tab, “Show by Faculty”.
- Select the **Faculty** member on the drop-down.
- On the right-hand side of the screen is a list of **Available Courses**. Find a course the selected teacher will be teaching and drag it to the cycle day and period on which the teacher will be teaching.
- When the course is “dropped” into the cycle day and period you’ve selected, the following screen will display:



There are several checkboxes that need to be mentioned.

- **Elementary?** – If this is checked, you are saying this course is an elementary course. You would typically only do that for courses like "First Grade", "Second Grade", etc. This checkbox will allow a teacher to create several subjects for the class, with a separate grading screen in gradebook for each subject.
- **Take Attendance?** – If this is checked, then this course will be available in the Attendance module on the web and teachers will be able to take attendance.
- **Homeroom?** – If this is checked you are saying that this class is the homeroom class. That comes into play with assigning advisors, taking lunch counts, etc.

After you've made sure all of the fields are correct, press **Save** > **Done**. The Master Schedule screen will then display as follows:



Go through and add all the courses for faculty members. If a course appears in red, that means there is more than one course scheduled at the same time. That could happen if a teacher has a combined class.

Schedule Students

You are now ready to schedule students into classes. There are several methods that can be used to accomplish this. Please refer to separate documentation for that step, as it is beyond the scope of this document.

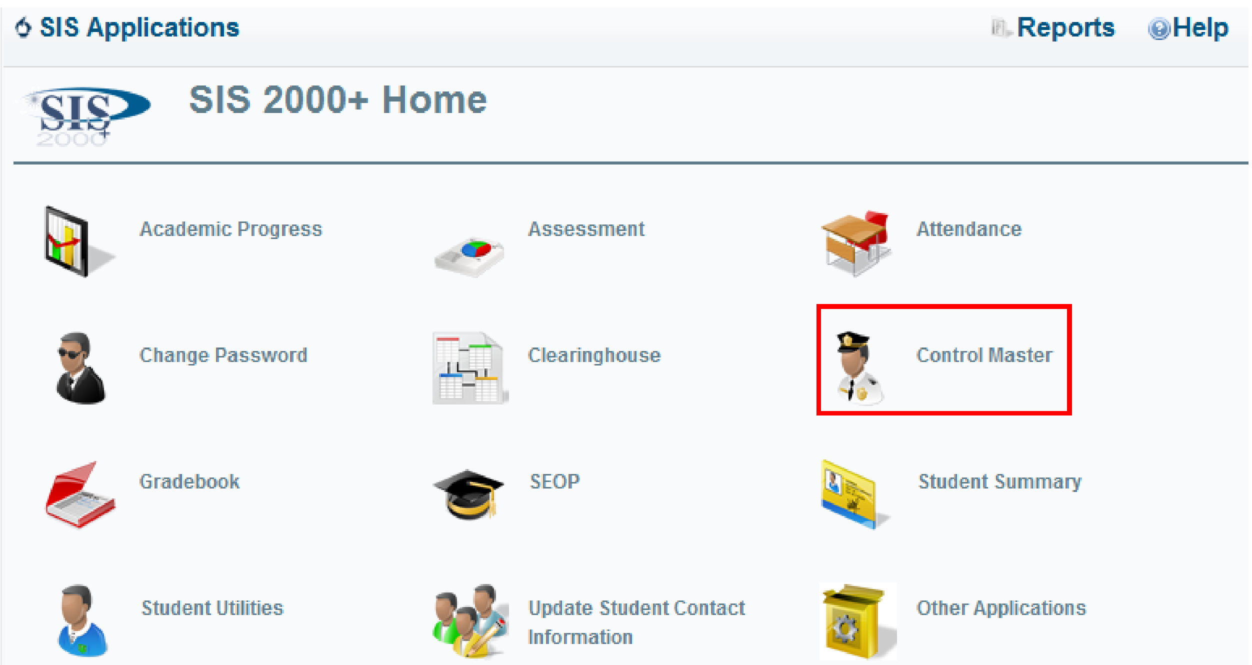
Control Master

Control Master is found on Web SIS. Control Master is where you create groups and assign permissions to those groups. This part of the tutorial will show you how to create groups for teachers.

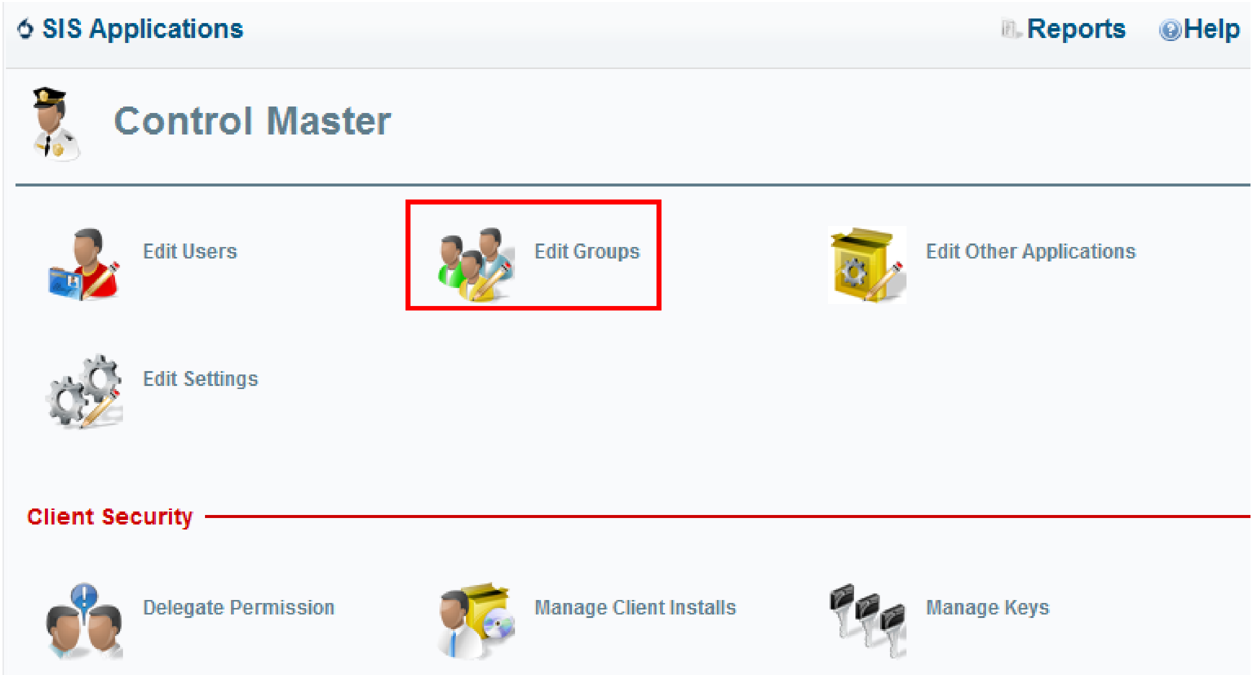
Creating Groups

Log in to Web SIS, using the login that USOE gave you. DO NOT change the cmadmin log in. That is the login that USOE uses to log in to Web SIS for your LEA.

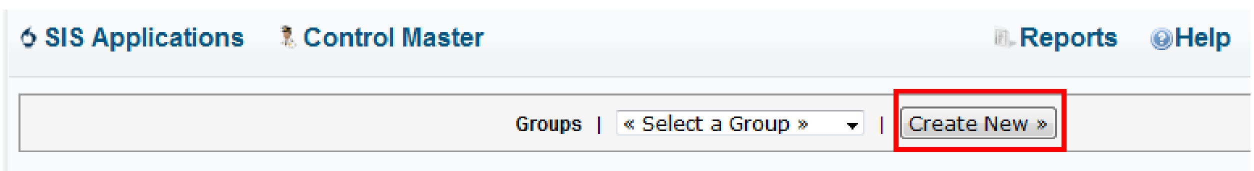
Once you're logged in, you'll see a screen like the one displayed below. Click on **Control Master**.



When you click on Control Master, you'll see the following:

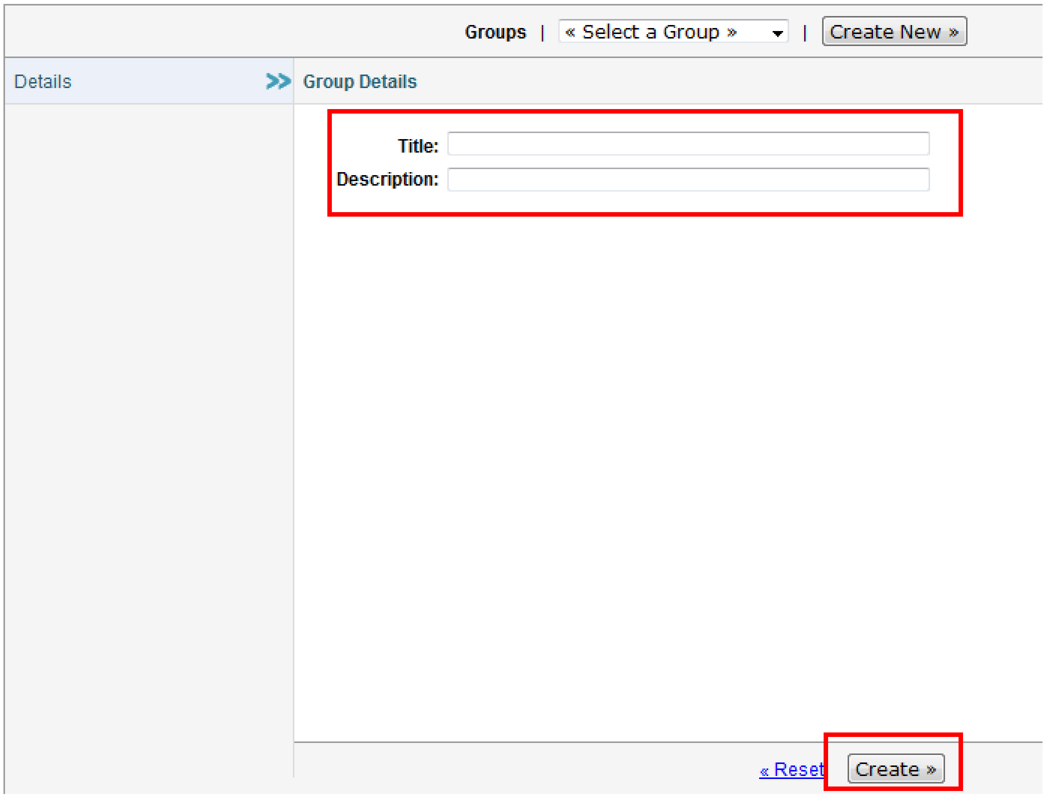


Click on **Edit Groups** and the following screen will display.

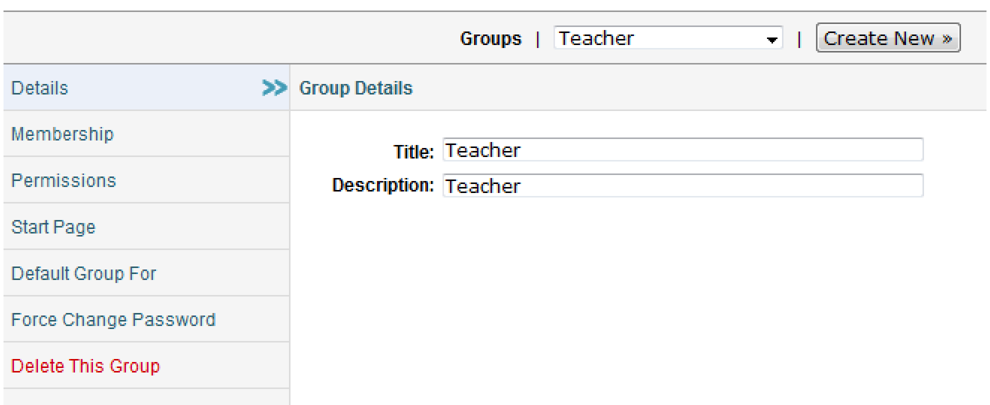


Before you create a new group, you may want to see what groups already exist. Click on the drop-down arrow where it says "Select a Group" to see a list of existing groups.

To create a new group, press **Create New**. The following will display.



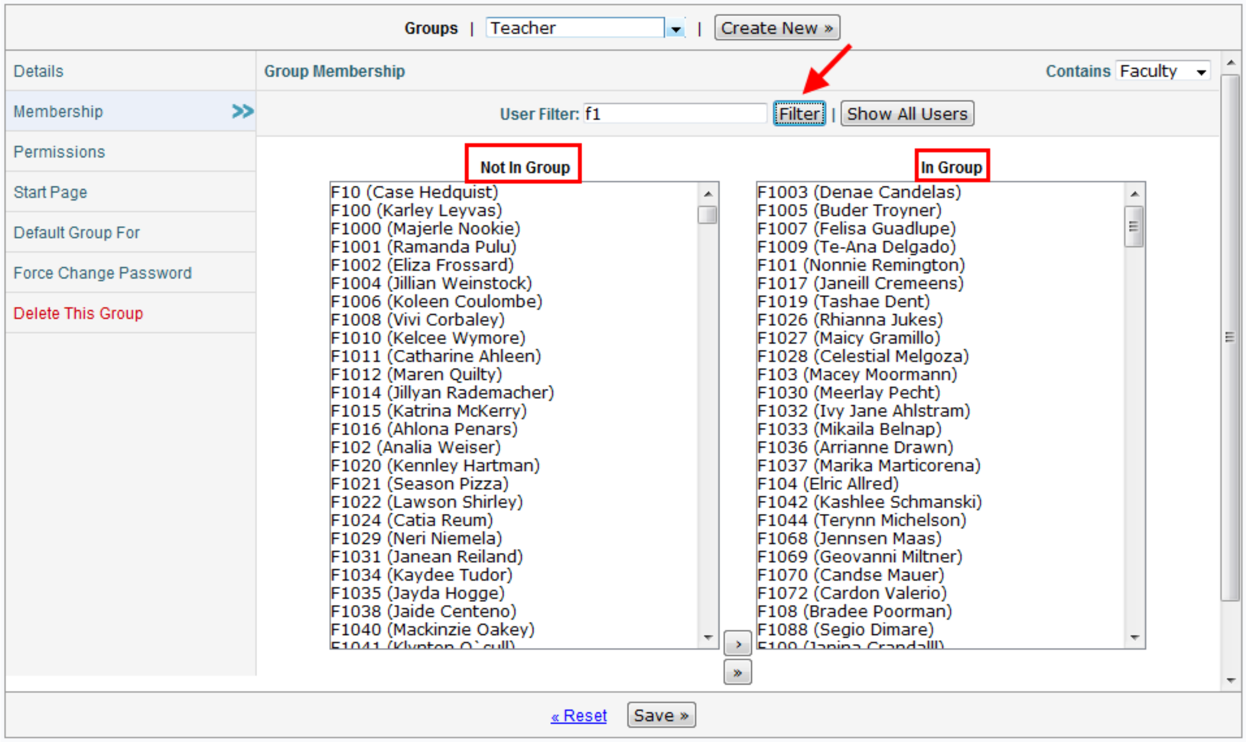
Enter a **Title** and **Description** for the new group and press **Create**. If you created a group called "Teacher", it would look something like the following:



Notice the list of items that appear on the left-hand side of the screen. The most important one is Permissions, although a description of each is listed here.

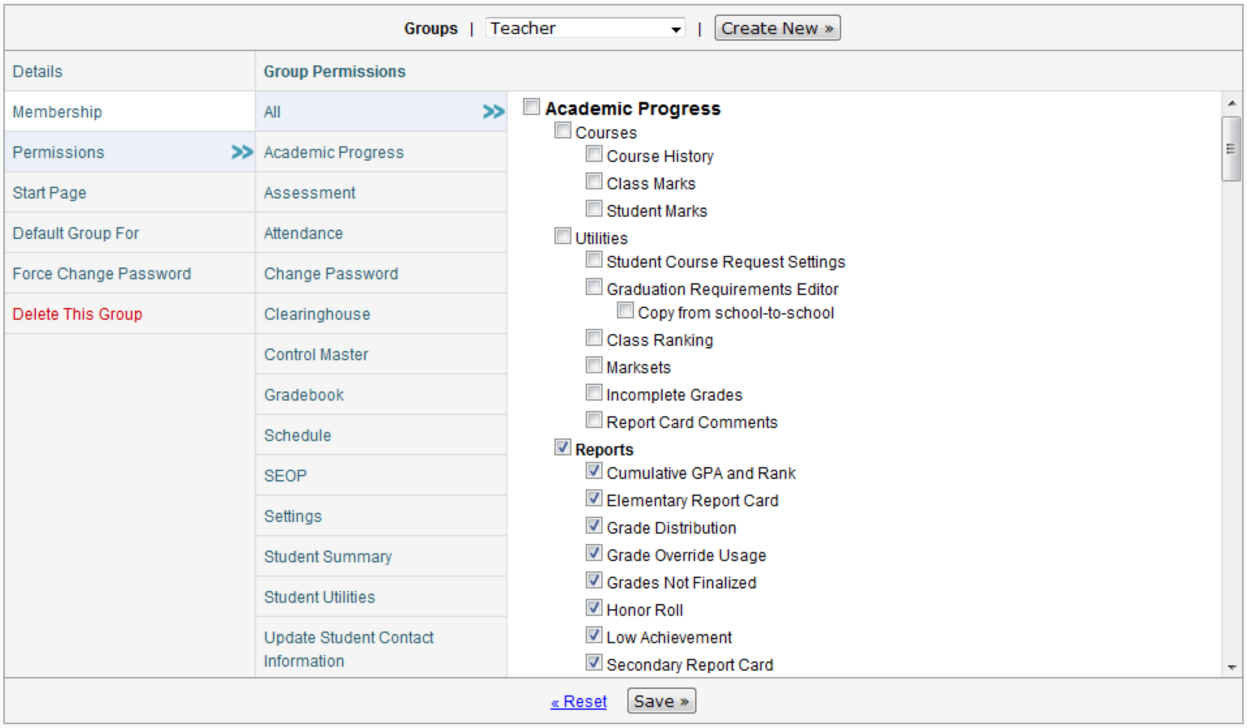
Details – clicking on this will display the title and description of the group you are working with.

Membership – clicking on this will display a screen like the following:



You can view members of the group by pressing **Show All Users**. You can also filter by typing in letters, numbers, or other unique identifiers, and then pressing **Filter**. You can add members to the group by highlighting a person in the right-hand pane and pressing the right-pointing arrow at the bottom of the screen. You can remove group members using the same method. Scroll down to access the left-pointing arrows.

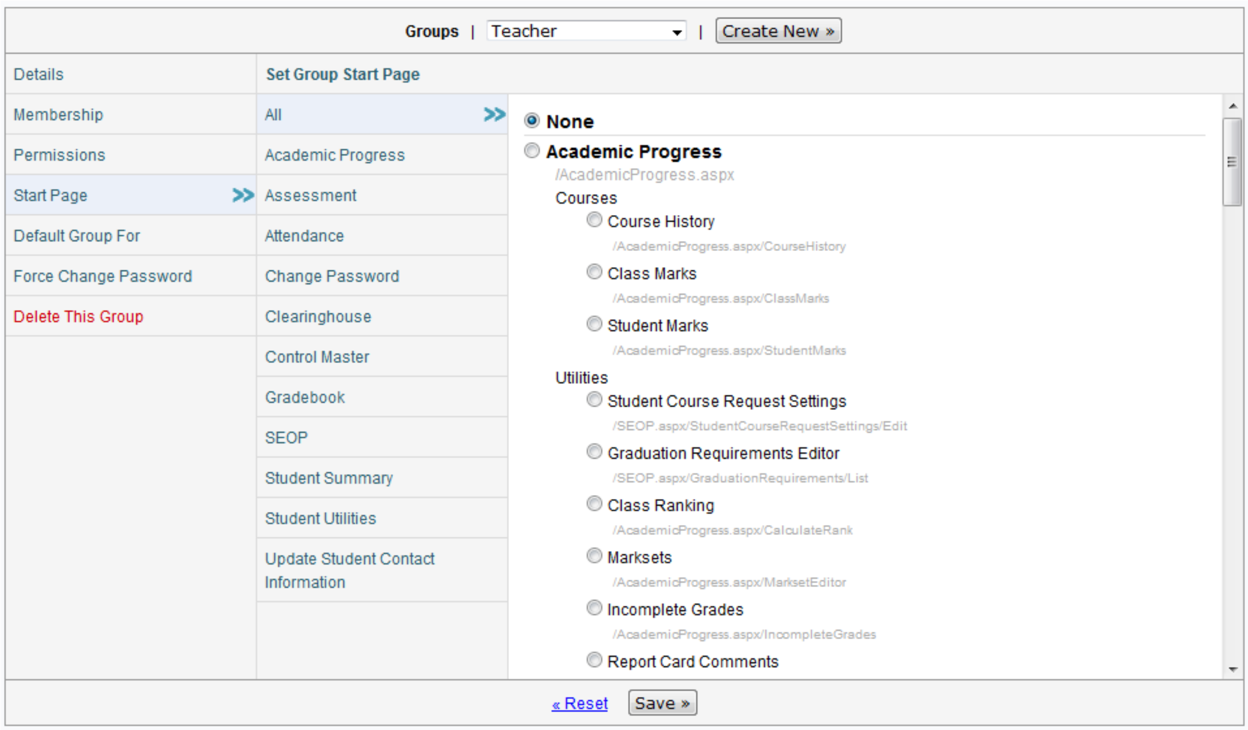
Permission – clicking on Permissions will display a screen like the following:



This screen allows you to assign the permissions to the specified group. Each group is set up differently, based on the needs of their job responsibilities, which will be determined by the District Office or Principal. Permissions can be changed at any time.

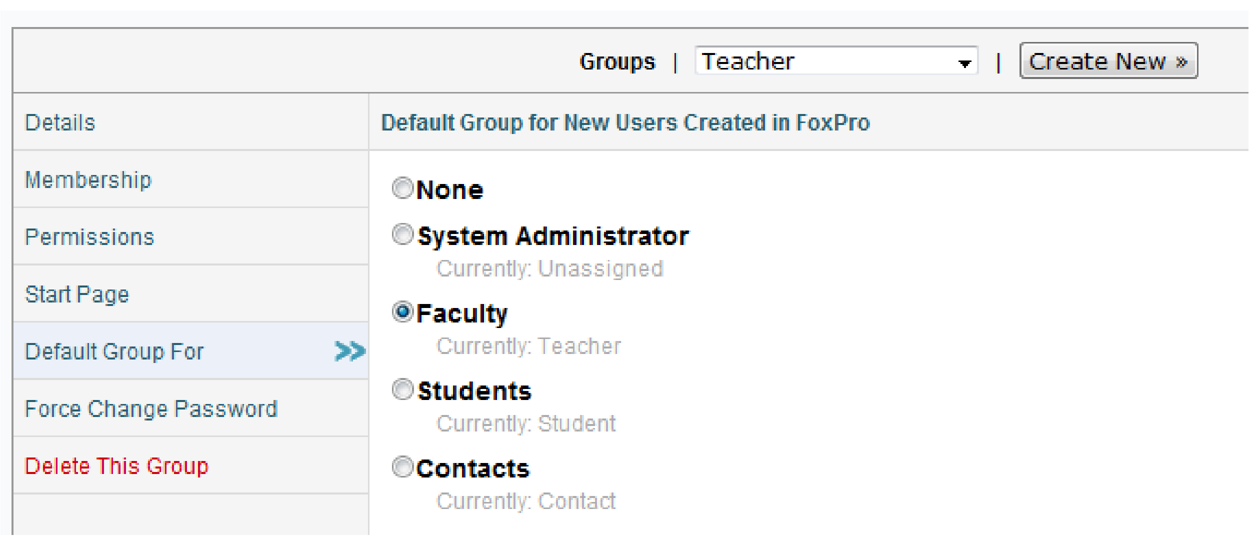
Go through the list of permissions and assign the teachers group the appropriate permissions and then press **Save**.

Start Page – click on Start Page and the following will display.



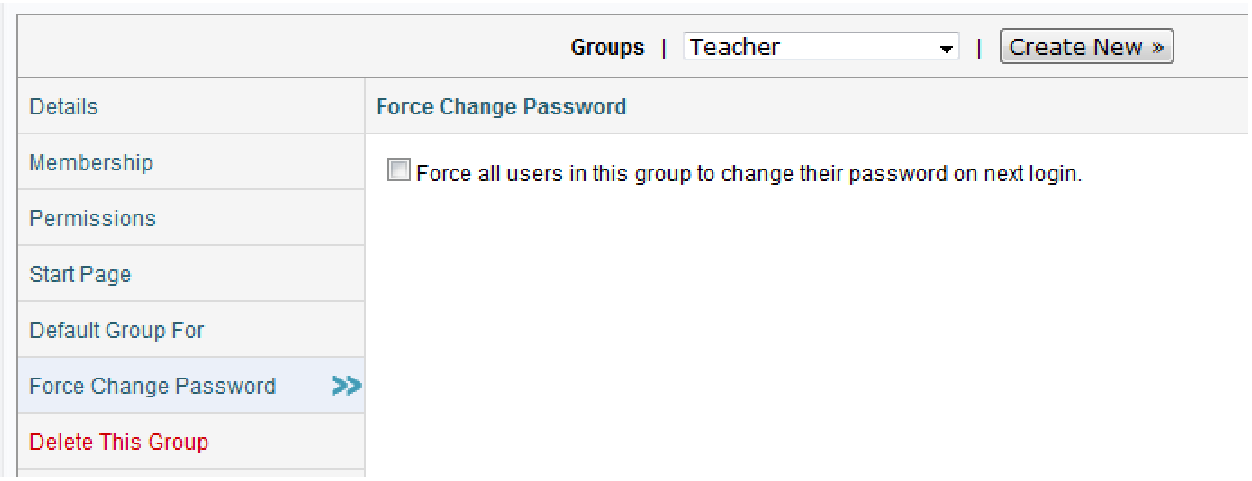
The Start Page determines what a user will see when he first logs in to Web SIS. If "None" is selected, the user will see a full menu of items for which he has permission. Typically, teachers are set to see either Attendance or Gradebook.

Default Group For – click on Default Group For to see the following:



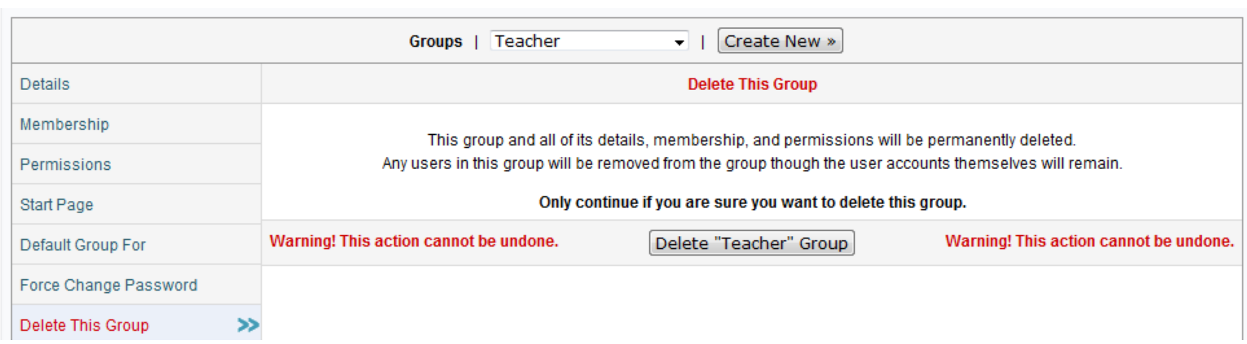
This screen tells the system which Web group certain types of people will default to. Typically, for the Teacher group, you would select "Faculty". That way, whenever you create a new faculty member in FoxPro, that person will automatically be assigned to the Teacher group on Web SIS.

Force Change Password – clicking on this will display the following:



Placing a checkmark in the box will force all users in the selected group to change their passwords the next time they log in. That is useful if you were to assign a default password to everyone and you wanted them to create their own unique password on first login.

Delete This Group – clicking on Delete This Group will display the following;

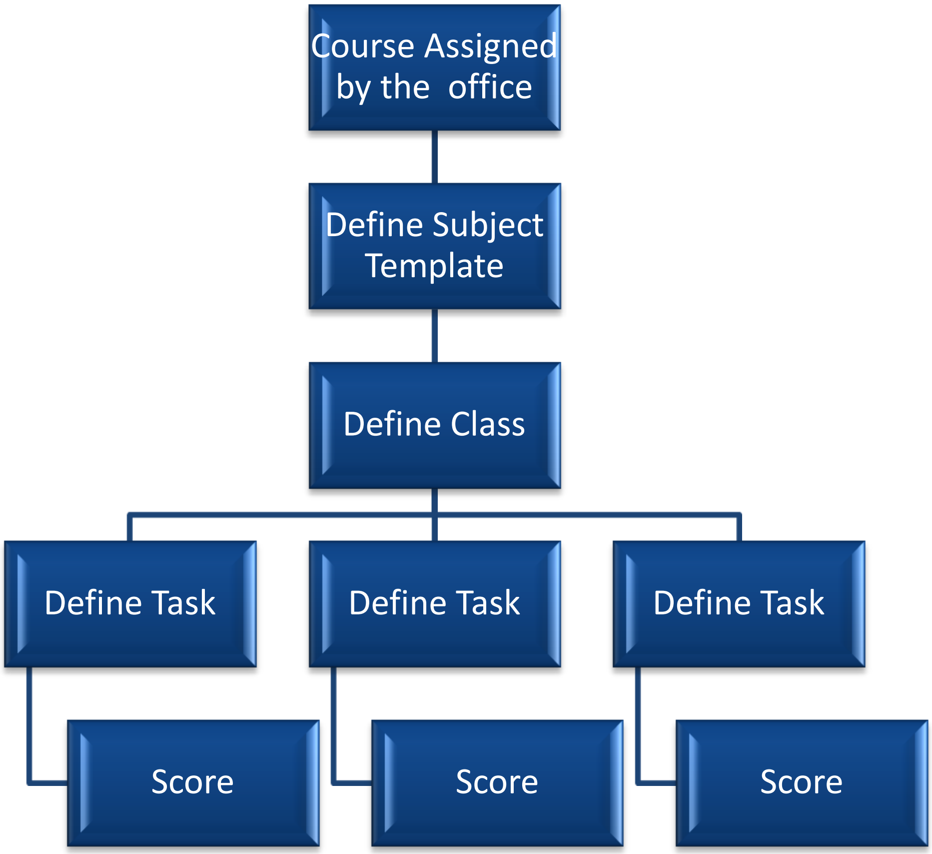


This screen allows for any group to be deleted, but be aware that once you delete a group, the action cannot be undone.

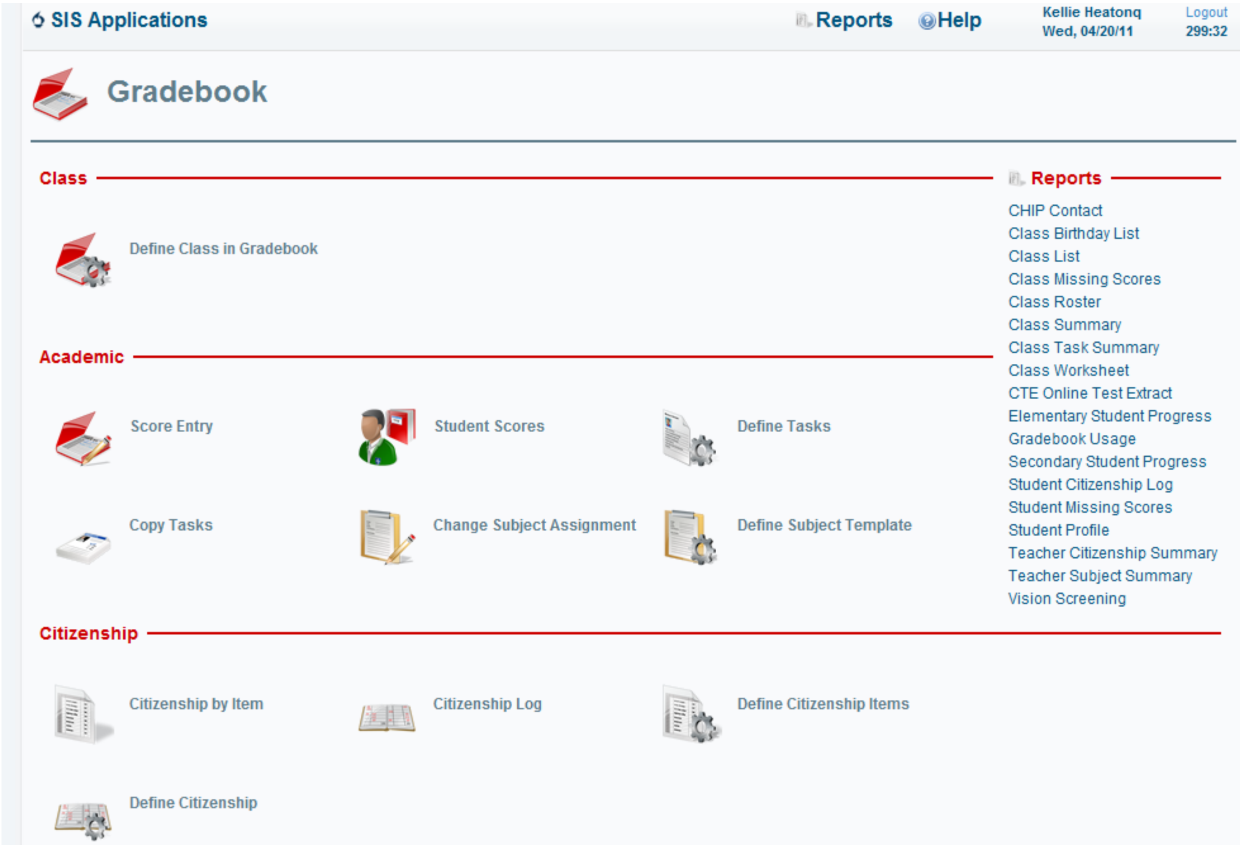
Setting Up Gradebook

Once teachers have Web access they can set up their Gradebook. There are several steps involved in this process. When the teachers first log in to the Web, they will need to bring up the Gradebook module. If the Start Page was set to Gradebook, they will be on the Gradebook module when they log in. If it was set to something else, they will need to select the Gradebook module.

Below is a flowchart of how to create the Gradebook Hierarchy.



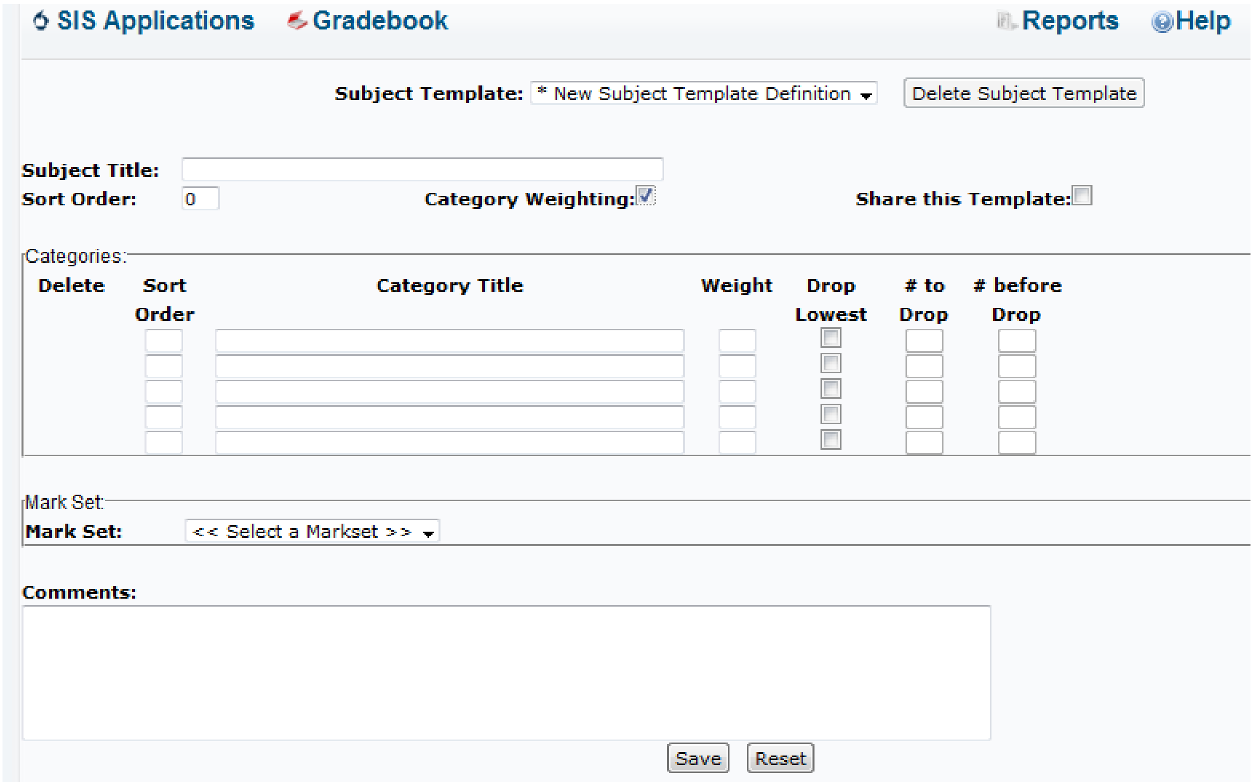
When the Gradebook module is selected, it will appear as follows:



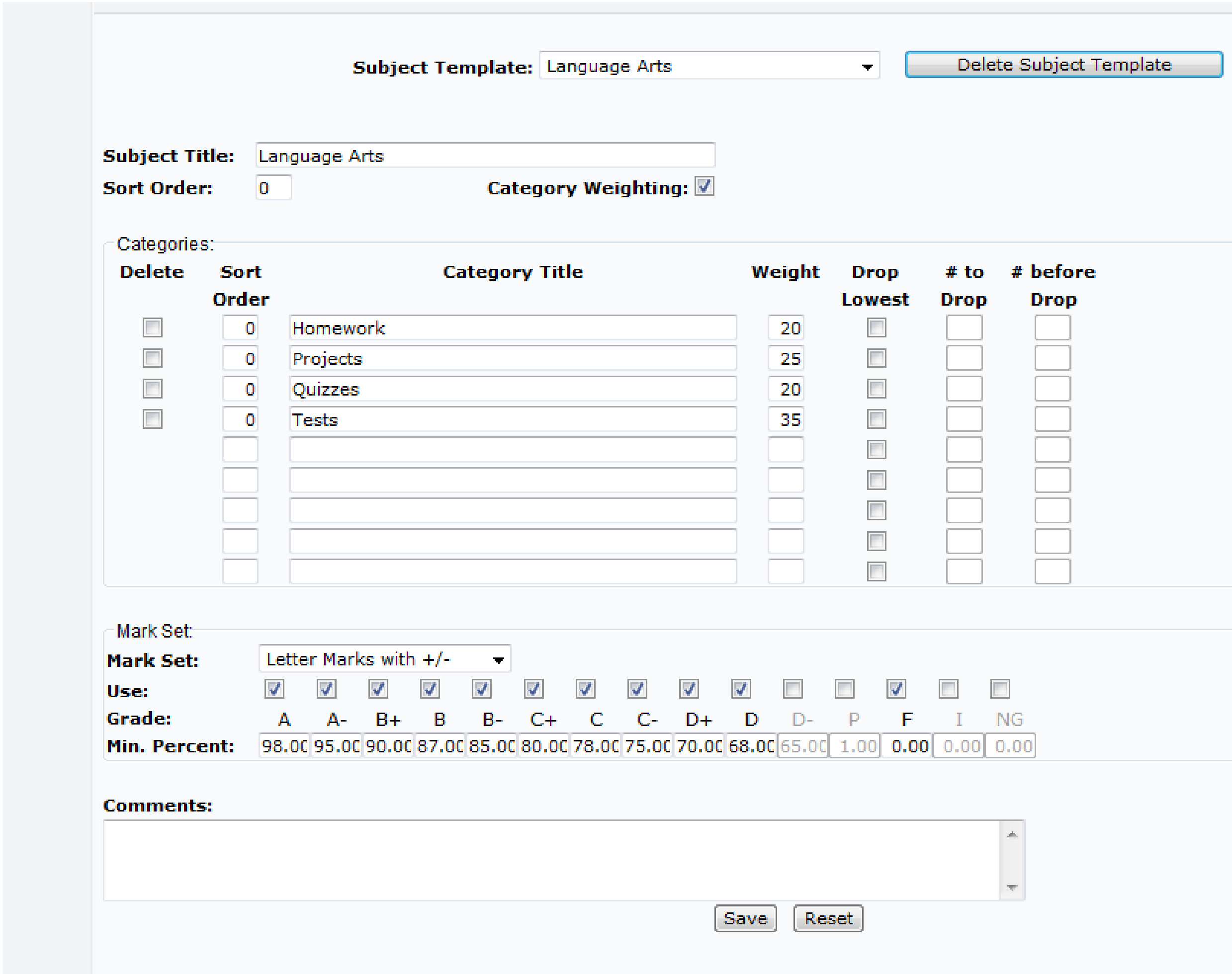
Define Subject Template

NOTE: Elementary set up has some differences, which will be explained at the end of the section.

1. Before you can “Define Class”, you need to create the Subject template. This template is useful if the teacher has several classes that are the same. Then he/she creates the template, and then copies that template into each class.
2. Click on **Define Subject Template** to see the following:

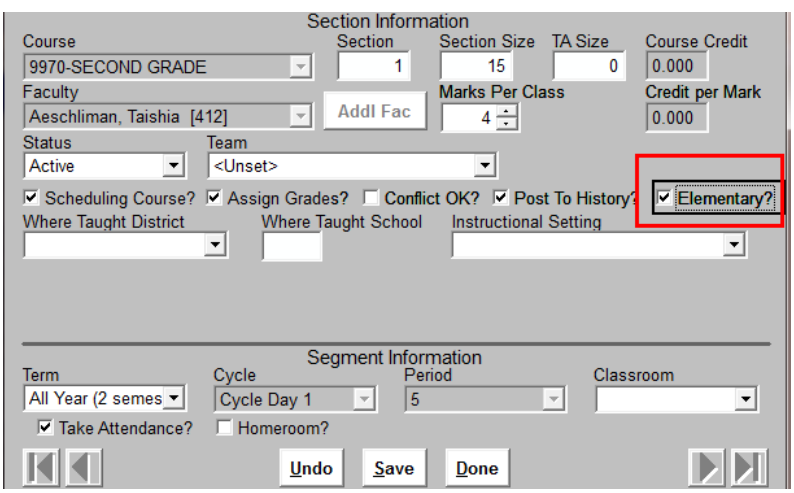


a. Enter a **Subject Title**, such as the name of the class or subject.
b. Enter **Categories.** (e.g. Homework, Quizzes, Test).
c. Enter the **Weight** each category will have in the overall grade. (You will need to checkmark “Category Weighting” for the Weight column to appear).
d. Choose the **Mark Set** and deselect any options you won’t be using. The markset MUST match the markset that is selected in FoxPro in Scheduling > Mass Scheduling > Course Selection.
e. Press **Save**.
f. When you’re done, it will look something like the following:



Define Subject Template for an Elementary Class

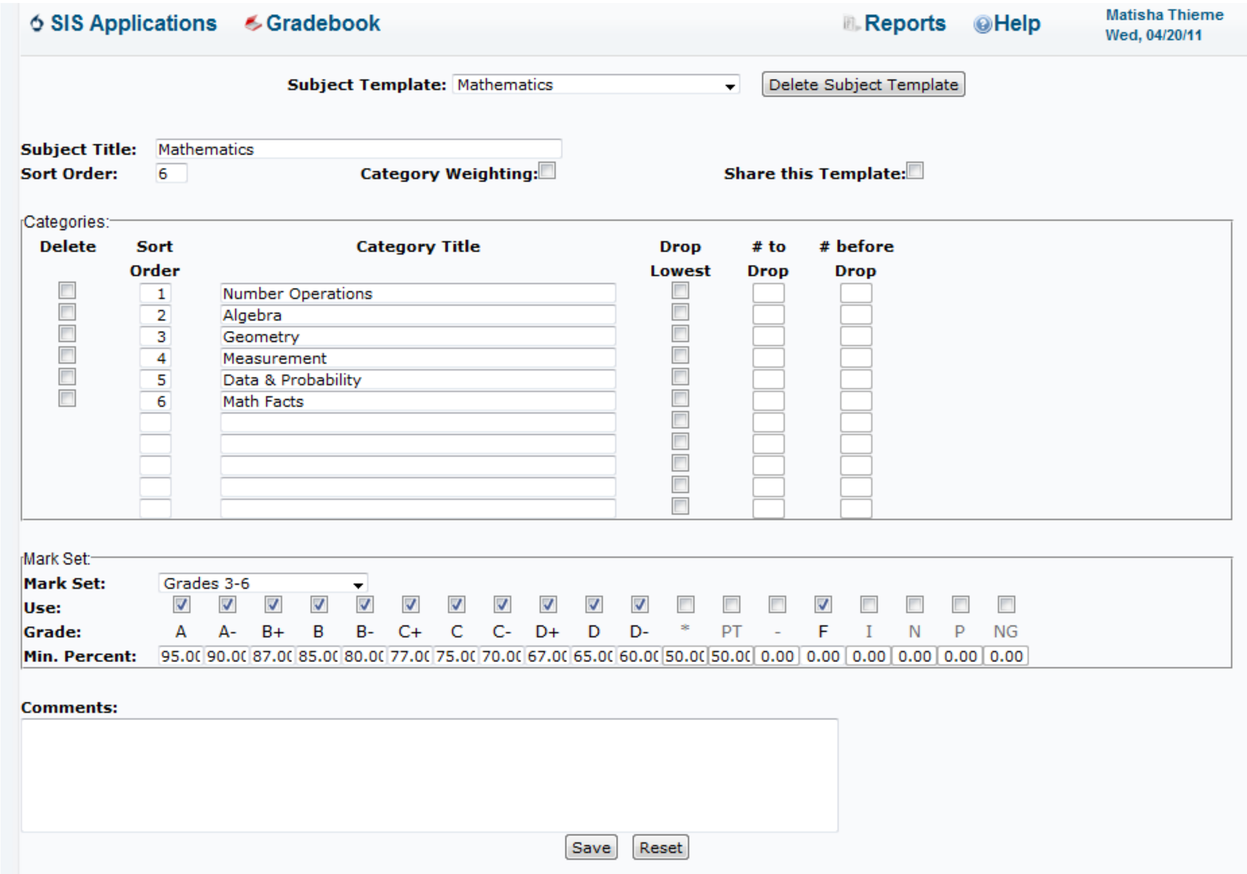
When a class is set to “Elementary” in the Master Schedule as shown below, the set up in Gradebook is a little different.



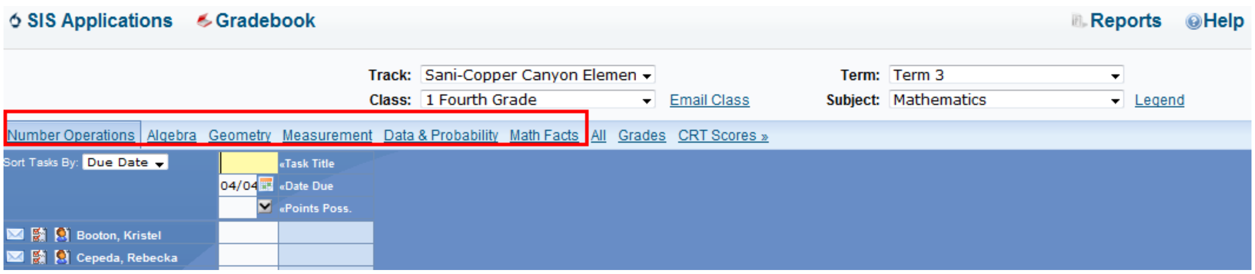
For an elementary school, rather than have multiple classes, a teacher would have one class, like second grade, and within that class she would have multiple subjects, like Math, Reading, Science, etc.

To create the subjects, you would go to Define Subject Template and enter the data mostly the same as described above. The main difference would be the **Category Titles**. The Category Titles that you create would be created as tabs in the Gradebook.

Here is what the Mathematics Subject Template might look like:

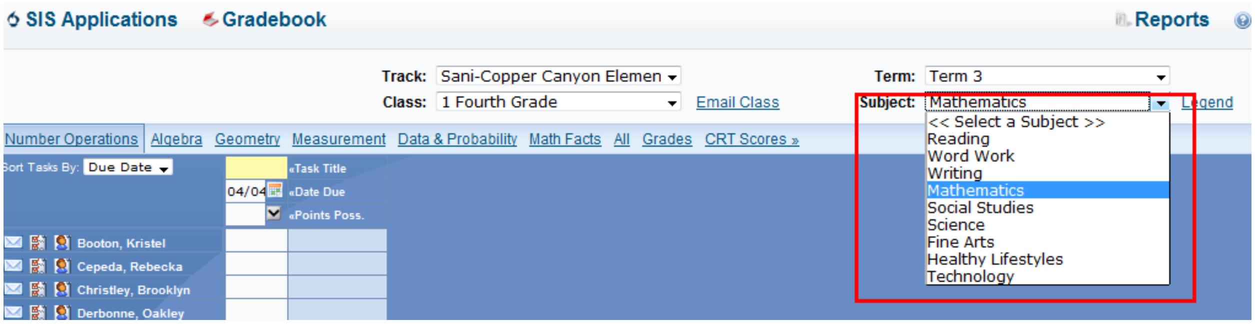


And here is what the corresponding Gradebook would like for that subject:



Notice that the tabs across the top are the Category Titles.

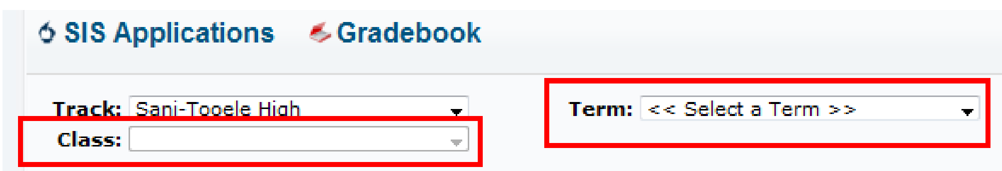
You would create a Subject Template with accompanying Category Titles for each subject. Then when you are in the Score Entry screen, you would choose the subject from the drop-down, as shown below.



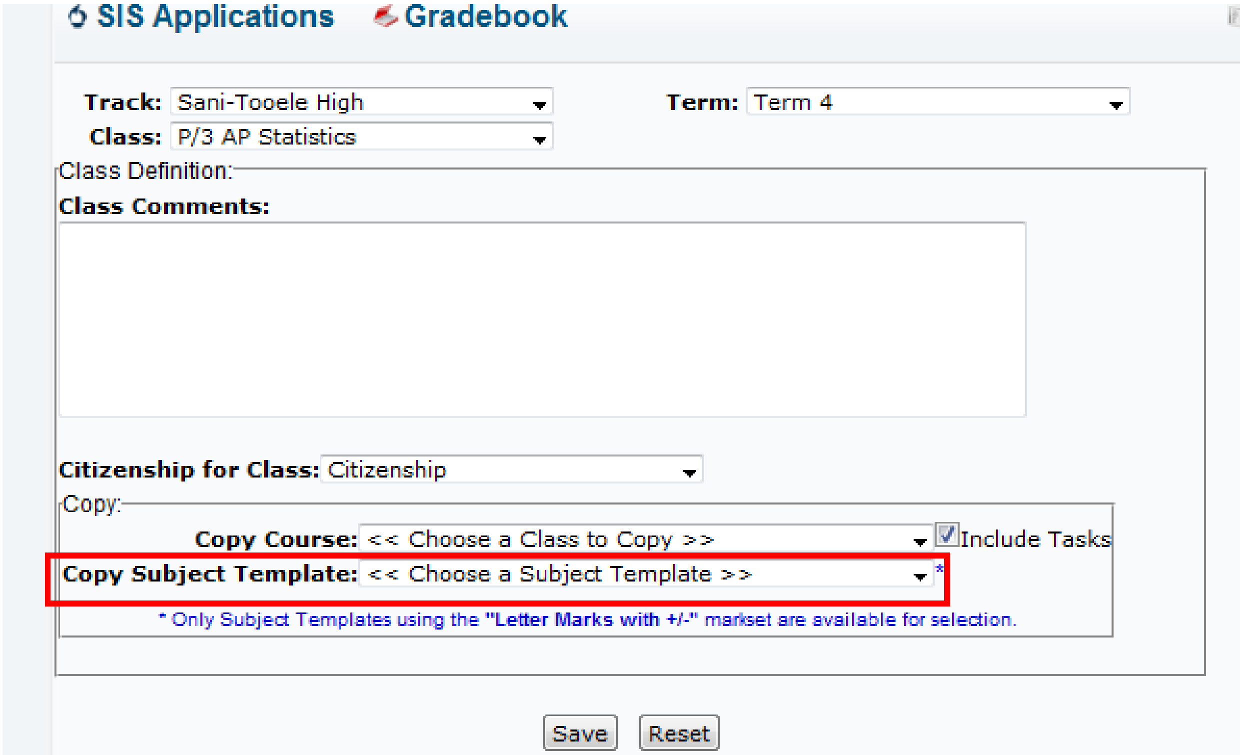
Define Class in Gradebook

NOTE: For elementary, there is a slight difference, which is explained at the end of this section.

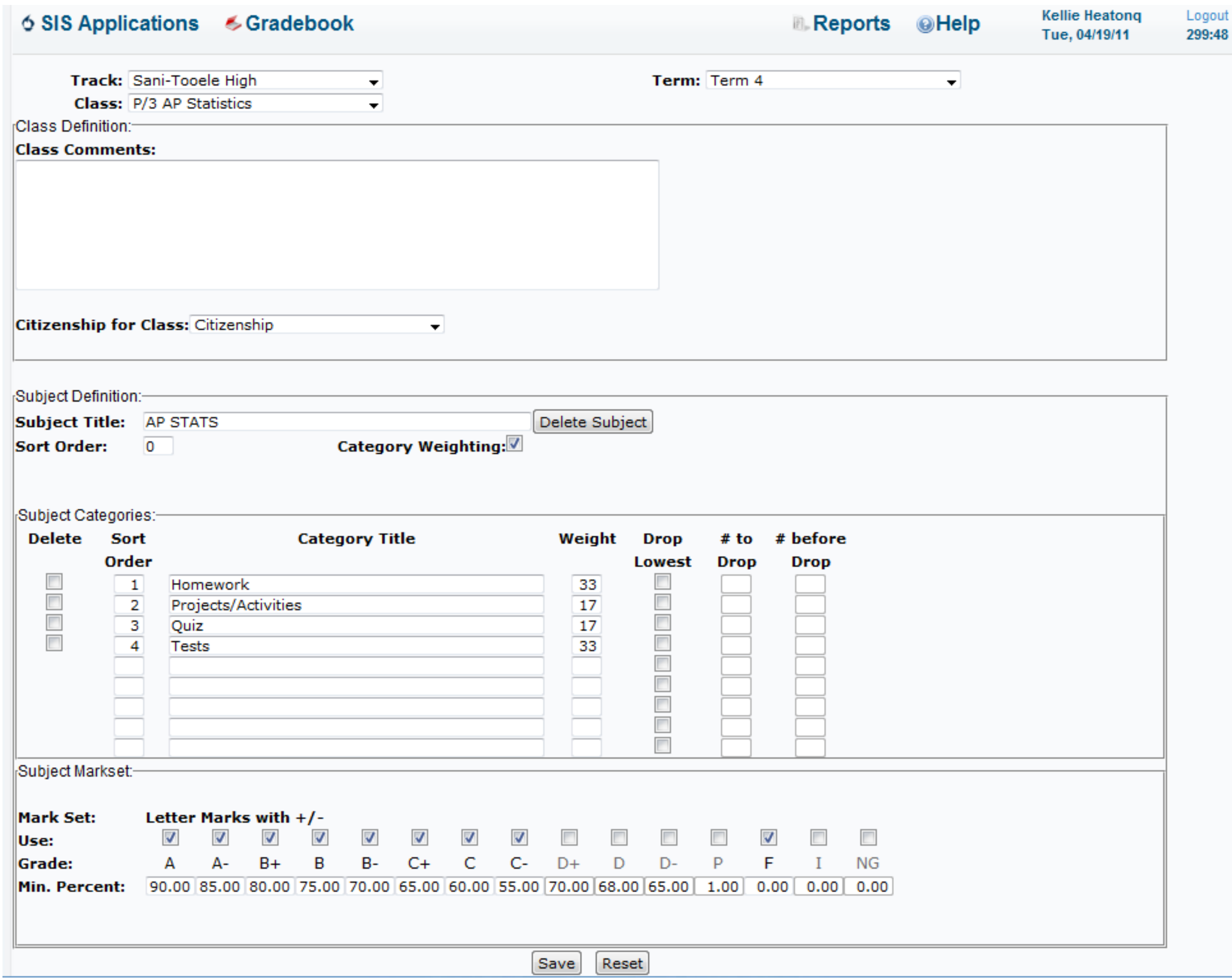
- Click on **Define Class in Gradebook**.
- Choose a T**erm** and **Class** from the drop-down menus.



- Once you've selected the Term and Class, the following will display.



- Select a **Subject Template** from the drop-down. The list of subject templates you've created will be available to choose.
- Press **Save** to see the following:



- Make any changes unique to this class and press **Save**.

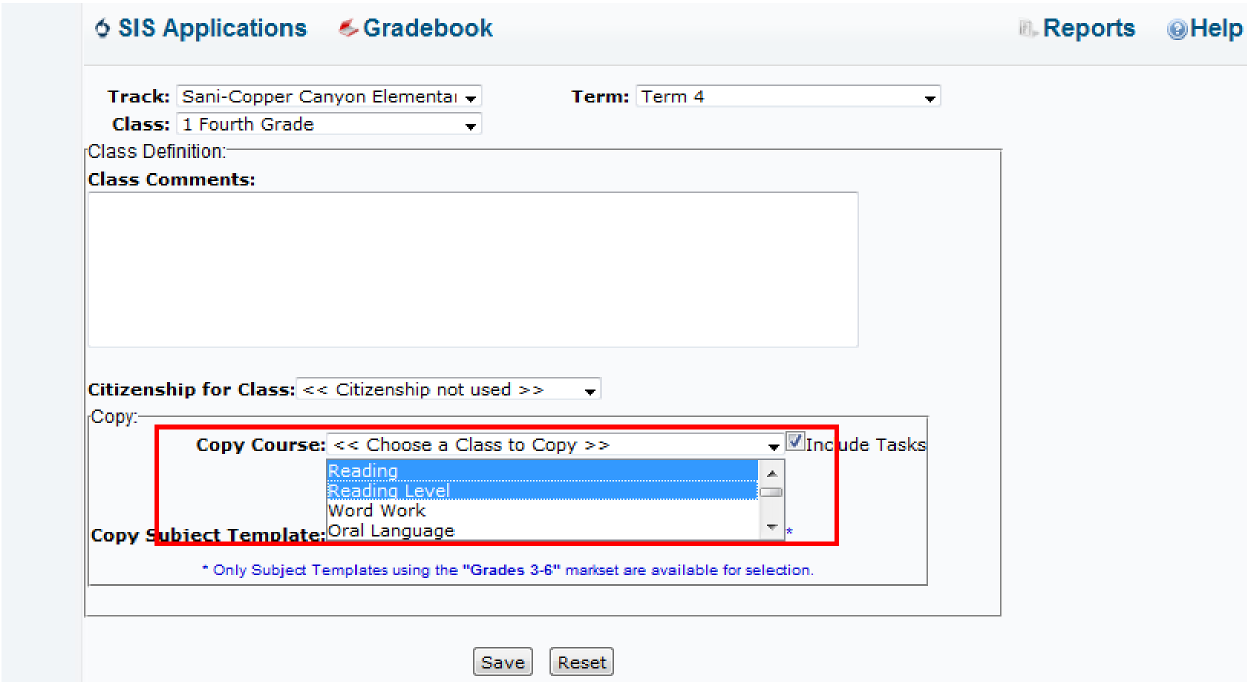
To delete a subject template from a class

- Go to Define Class in Gradebook.
- Place a checkmark in the Delete column next to each Category Title.
- Press Save.
- Press Delete Subject.

Define Class for an Elementary Class

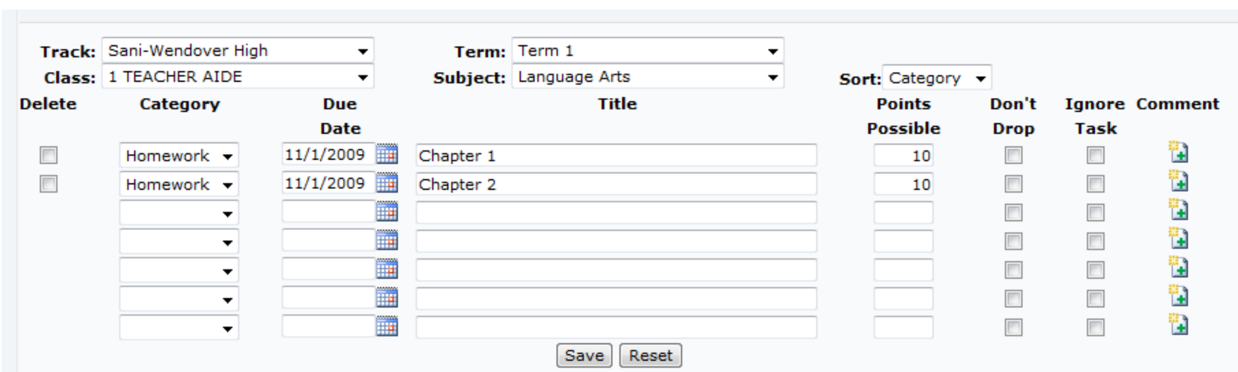
The only difference for an Elementary class is, when you choose the Subject Template, you will choose all of the Subjects that you want tied to your elementary class. You can hold the Control key down to select multiple subjects at once. (See screen shot below.) You can also copy an existing class. This is helpful if you want to copy the same subjects from one term to the next.

Make sure to press **Save** when you are done.



Define Tasks

In the **Define Tasks** screen, you will create the names for the homework assignments, quizzes, tests, projects, etc. that will be graded in the course. The screen displays as follows:

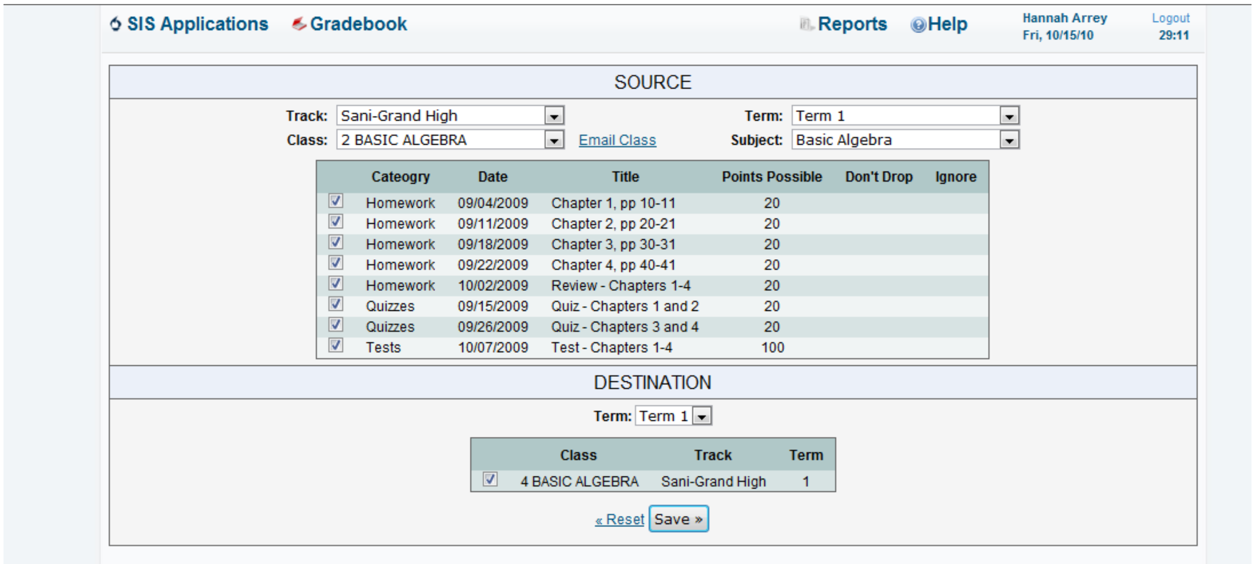


- Select a **Term**, **Class** and **Subject**.
- Enter a **Title** for each task that will be graded.
- Assign the Task to a **Category** by using the drop-down list.
- Enter a **Due Date**.
- Enter **Points Possible**.
- Press **Save**.

Copy Tasks

To **copy tasks from one class to another**, make sure both classes have the same subject template.

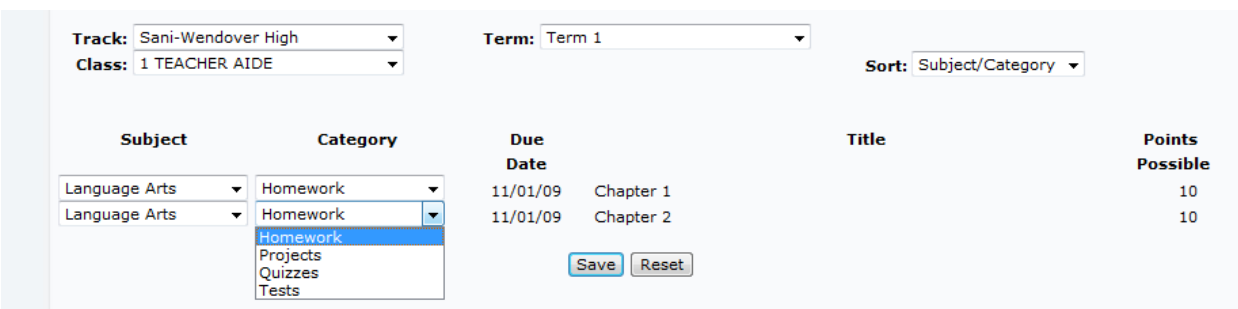
- Go to Gradebook > Copy Tasks. The following will display.



- Select the **Source** (the place you want to copy FROM).
- Select the tasks you want to copy.
- Select the **Destination,** (the place you want to copy TO).
- Press **Save**.

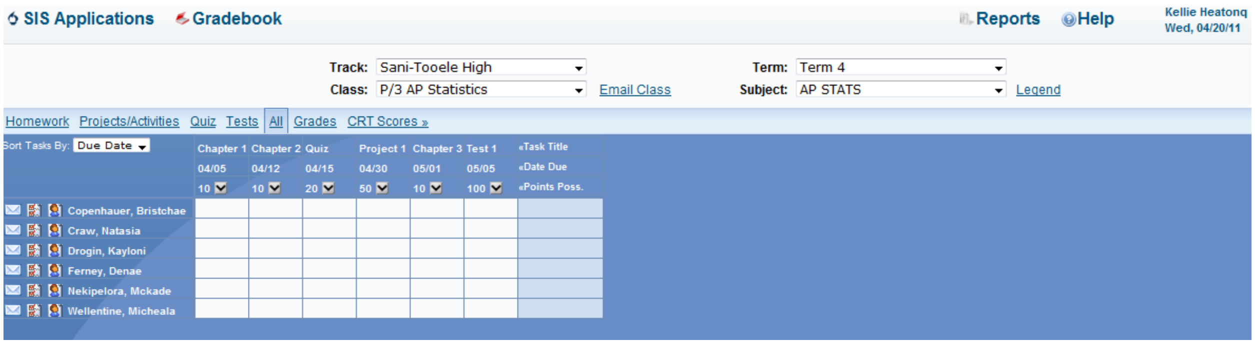
Change Subject Assignment

This screen allows you to reassign the subject and/or category assigned to a task. To access this screen, go to Gradebook > Change Subject Assignment. The screen displays as shown below.



Use the drop-down lists to change the Subject or Category for an existing Title (task).

Now when you select **Score Entry** in the Gradebook module, you will see the students assigned to your class, as well as the tasks you've created. It might look something like the following:



Prepare Information for Parental Web Access

If you would like parents to be able to access their student's Student Summary, you will need to give them access to Web SIS.

To do this, go into Control Master and create a group called something like "Contacts". You'll need to assign the appropriate permissions. Typical permissions are listed below.

- Academic Progress
  - Reports
    - Elementary Report Card
    - Secondary Report Card
    - Student Transcript
- Attendance
  - Reports
    - Student Attendance
    - Student Attendance Detail
- Change Password
  - Allow Password Reset
  - User Can View Own Profile
    - View Mailing Address
    - View Home Address
    - User Can Update Own Profile
      - User Can Update E-mail Address
  - User Can Change a Student's Password
  - User Can Change Own Password
- Gradebook
  - Reports
    - Elementary Student Progress
    - Secondary Student Progress
    - Student Citizenship Log
    - Student Missing Scores

            - Student Profile

- Settings
    - View students for whom the user is a contact
    - Contacts Can Self-Register User Accounts
- Student Summary
    - Allow E-Mail Subscription
    - View Student Summary during the summer
    - Email Student
    - Email Teachers
    - Show Faculty URL
    - Show Assessment Scores
    - Show Lunch Bal for Contact's students
- Update Student Contact Information
    - Contacts Can Edit Name
    - Contacts Can Edit Health Alerts
    - Contacts Can Edit Preferred First Name

Be aware that when you checkmark a group, like "Attendance", all the checkboxes in that group are automatically checked. You'll want to uncheck permissions that are not appropriate for a contact and only leave permissions checked that you want the contacts to have

Basic Steps Checklist

Use the checklist shown below to track what items you have completed. The items should be completed in order.

- On each PC that will use SIS (FoxPro version):
  - Establish Remote Access to Terminal Services
  - Install Uniprint
- Apply for SSID System login and MoveIT login
- School Editor – set up school and district office
- Track Editor
  - General track information
  - Create Calendar – each term starts the day after the prior term ends
  - "# periods absent = 1 full day" – set this field carefully
  - Include term codes that will be used in scheduling
- Faculty Editor – add all faculty
- Student Editor – add all students
- Run SSID process – UT Audit/Uploads
- District Courses – Found under System > District Courses
  - Elementary only Scheduling > Mass Scheduling > Course Selection: use "Exclude from Clearinghouse" Cactus Core Code for classes other than the one homeroom
- Course Selection – Found under Scheduling > Mass Scheduling > Course Selection (move district courses into track)
- Master Schedule – assign Classes to Teachers. Found under Scheduling > Master Schedule
- Schedule Students
  - Assign Students (Student Schedule Assignment) – choose students by class
  - Assign Students (Student Schedule Editor) – choose classes for individual student
  - Loader (needs requests, rules)
- WEB
  - Set up groups and permissions in Control Master
  - Teachers set up gradebook
  - Prepare information for parent web access

HINTS

1. Make sure SSID numbers are obtained properly and kept updated at minimum on a Monthly basis
2. Ensure that your school calendar and terms are setup correctly before scheduling ANY students
3. Use Scheduling > "Change History" screen to diagnose Clearinghouse errors
4. Ensure that Markset in teachers' "Subject Template" matches Markset in the Course Selection Editor – or teachers will not be able to "Define Class"
5. Never schedule one student as a regular student and as a TA in the same class

6. Run the Clearinghouse Edit program often – not just when the files are due
7. Become familiar with all available documentation